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ABSTRACT

This manual contains descriptions of the Leadership Training Model and of workshops for the professional development of "instructional support" teachers who have leadership roles in developing inservice programs for school staff. The Leadership Training Model was developed by the Edgewood Independent School District/Trinity University (Texas) Teacher Corps Project as a response to the need for training teachers to be leaders in professional development. The Leadershp Training Model involves the formation of a Professional Development Committee (in each school), which consists of the instructional support teacher, the principal, counselors, other teachers, paraprofessionals, parents, and students. This committee is responsible for designing and conducting a professional development program specifically tailored to the school and for creating a school climate program. One outstanding teacher is selected to act as instructional support teacher and is freed from all other teaching duties. Chapters in this manual present workshops for the instructional support teachers on: (1) professional development; (2) consultation skills; (3) group facilitation; (4) leadership skills; (5) clinical supervision; and (6) workshop design. (JD)

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ED218268

LEADERSHIP TRAINING

A Manual for Training Teachers to be Leaders in Professional Development

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Jessica B. Leslie

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Edgewood/Trinity Teacher Corps Project, San Antonio, Texas, 1982.

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FOREWARD

For ten years, the Teacher Corps Project has been operating in the Edgewood School District, utilizing district, university, and community resources toward the development of a better educational system for minority and low-income children. Although the project has changed in focus and structure over the years, the goal has always remained the same.

Teacher Corps Program '78 provided a change in the operations of the project by requiring the institutionalization of those activities which proved most successful and beneficial to the District and to Trinity University. Evidence of the institutionalization process has been described as the existence of items in institutional budgets for particular activities or other similar financial commitments to assure the continuation of the desired activities. This manual is an example of the kind of activities the District intends to institutionalize.

In the federal guidelines for institutionalization, however, there is no mention of the role of the individuals who experienced these activities and of their importance to the success of the institutionalization process. Manuals can be developed and materials distributed. but the individuals who choose to use them are the essence of institutionalization. Many times, the institutionalization process has occurred at an informal level long before the formal acceptance of any activities by the Board of Trustees and the administrative staff of the Central Office.

Herein lies the importance of the Teacher Corps Project. It has allowed individuals to be exposed to the procedures, processes,

and ideas that are described in this document, and it has provided mechanisms for staff to institutionalize them in their own individual "institution", whether it be their classroom, their department, or their school. This is the type of institutionalization that is most successful, because it occurs at the "top" and the "bottom" of the hierarchy simultaneously.

This document is one of the many legacies that Teacher Corps has left for the Edgewood District, and it will facilitate the continuation of the products and processes that have proven useful over the last few years. The impact on individuals of the learning and development encouraged by the activities described in this manual will prove, in the long run, to be the true institutionalization of the Teacher Corps Project.

James R. Vasquez,
Superintendent
Edgewood Independent
School District

Chapter One

THE LEADERSHIP TRAINING MODEL

Jessica B. Leslie

Introduction

The Leadership Training model was developed by the Edgewood Independent School District/Trinity University Teacher Corps project as a response to the need for training teachers to be leaders in professional development. During its association with Teacher Corps, the Edgewood District revised its professional development program to include a school-based component, relying heavily upon teacher involvement. The teachers' new role in professional development required new training; therefore, the Leadership Training was devised to take care of this need.

Professional Development Model

The professional development program is school-based to insure the active participation of teachers in its design and implementation. In this model, professional growth opportunities are continuously provided throughout the year as opposed to employing a "one-shot" approach to induce change and improvement. A Professional Development Committee is organized at each school in the district. It consists of the instructional support teacher, the principal, counselor, teachers, paraprofessionals, parents and students. The committee's two major goals are to design and conduct a professional development program specifically tailored to the school and to create a school climate program.

At the beginning of the school year, committee members, using

a variety of techniques, conduct a needs assessment to identify inservice priorities. Utilizing the results of the needs assessment, the committee devises a professional development plan for the year. Events are generally scheduled in the form of workshops, demonstration teaching, sharing sessions, curriculum writing, and reviewing new materials and techniques. Careful evaluation procedures are conducted and revisions made as needed.

Professional growth is also provided through individual and group consultation and personalized clinical supervision. These are described in more detail in the next section.

Instructional Support Teacher

The school district identified one outstanding teacher at each campus to serve as the instructional support teacher at that school. The support teachers are relieved of their teaching duties for the year so that they can spend 100% of the time acting as support personnel to the teachers, while emphasizing professional growth and instructional improvement. The support teachers are charged with the responsibility of designing a professional development program in the school to which they are assigned, utilizing teacher participation and collaboration. Their specific duties consist of serving as chairperson of the school's Professional Development Committee, conducting workshops, providing individual and group consultation, and offering clinical supervision. The following is a description of each of the duties.

When providing consultation within the school, the instructional support teacher acts as an empathetic listener who helps teachers solve their own problems. The support teachers are not counselors,

nor should they be viewed as having all the right answers. Instead, the support teachers serve as facilitators of problem solving. They are trained to help teachers clarify their problems or concerns and devise strategies for solving them. The support teacher is there to motivate, praise and encourage teachers to share their talents. The consultation role also is deeply embedded in the other duties, such as clinical supervision and committee work.

The support teacher also provides clinical supervision to teachers upon request. Supervision is an effective way of individualizing professional growth, and it serves as a supplemental activity to group events. Clinical supervision is not to be confused with the principal's role of evaluation; rather, the support teacher only acts in a supportive manner, as one teacher to another. If a teacher asks for this type of assistance, the support teacher and the classroom teacher meet in a preconference session. They discuss what it is the teacher wishes the support teacher to observe in his or her classroom. The arrangements are made, and the support teacher visits the classroom and simply observes what occurs. In a post-conference session, they discuss what the teacher wishes to change and the method for achieving the change. A plan is devised for successfully accomplishing the task, and further observations are scheduled if necessary.

Acting as chairperson of the school's Professional Development Committee, the support teacher organizes it and supervises the meetings. The committee is responsible for designing and implementing the school's inservice program for the entire year. The committee

consists of the principal, counselor, grade-level teachers or department chairpersons, a parent, student, paraprofessionals, and a teacher from the support areas, such as special education or the bilingual program.

At the beginning of the school year, the committee conducts a needs assessment for professional development. The type of needs assessment conducted varies with the choice of each school, but the committee members often utilize student achievement scores and teachers' needs as the basis. They list the weak academic areas exhibited by their students and then categorize and prioritize them. They combine these with perceived teacher needs and devise a list of workshop topics for their inservice program. The topics are matched with the available early-release and monthly inservice days, and the inservice plan is finalized. Each workshop and inservice activity is carefully documented and evaluated. The results, in conjunction with informal comments by the teachers, are used in revising and improving the inservice program.

In addition to designing the inservice program, a second major emphasis of the Professional Development Committee is the analysis of school climate. During the Leadership Training, each instructional support teacher is trained in developing a questionnaire for assessing the school climate. Individual student, faculty and parent questionnaires are developed by the Professional Development Committees at each school. They are administered early in the school year, and the committee tabulates the results and makes them available to the faculty, students and parents. Utilizing the results of the survey, committee members design a program to improve the

working atmosphere of the school, focusing upon the stronger points as well as the weaker ones. Near the end of the school year, the same questionnaire is readministered, and the committee analyzes the results, noting the improvements made and those still needing attention. The pretest/posttest format allows for the redesign of the school climate program for the following school year.

Leadership Training

To assist the instructional support teachers with their new role, Teacher Corps devised a training program for them, entitled Leadership Training. Staff members carefully examined the support teacher's role description and duties to determine the skills required for the job. As described earlier, needed skills centered around peer assistance in the form of classroom supervision, workshops, and consultation. The topics chosen for the Leadership Training were consultation and communication, leadership style and skills, professional development procedures, workshop design, clinical supervision and group facilitation. These are described in the following sections.

Professional Development

In the workshop on Professional Development (Chapter Two), the instructional support teachers receive background information on professional development. They examine a synthesis of research on characteristics of effective staff development programs and compare the findings to the model program currently in use.

During this session, the support teachers also learn methods for supervising their school's inservice program through group

effort and joint planning by the faculty. They learn how to organize a Professional Development Committee, insuring representation of all school personnel, and how to conduct productive meetings. They also learn needs assessment techniques from which the results form the core of the inservice program.

Consultation Skills

The workshop on Consultation Skills (Chapter Three) focuses upon three areas: process consultation, communication skills, and problem solving. The support teachers are trained in the process consultation model to use with teachers who express the need for assistance with a particular concern. They learn the skills of problem solving so that they can assist the teachers in solving their own problems, not in solving them for the teachers.

The support teachers are also given the opportunity to practice effective communication skills. They learn the use of attentive listening and facilitative responding to help keep lines of communication open and flowing freely.

The consultation skills presented in this workshop are extremely important for all of the duties of the instructional support teacher, not just for the sole purpose of consultation. They help him/her become a better leader, group facilitator, communicator, and clinical supervisor.

Group Facilitation

Because the district's professional development model relies upon teacher involvement, the instructional support teachers spend a great deal of their time in committees and groups. The purpose

of the Group Facilitation workshop (Chapter Four) is to provide the instructional support teachers with skills for working with these groups. The other workshops focus primarily on individual skills, whereas, this workshop is designed to aid the support teacher with collective efforts.

In this session, the consultant describes group dynamics and processes. The support teachers learn which factors inhibit group work and which factors foster it. Positive interaction between the group members is extremely important, and effective communication skills can enhance positive interaction. The support teachers learn the necessity of maintaining good group relations.

Also of importance is the concept of group processes. The need for active involvement of all group members is emphasized. Several techniques are demonstrated. While active participation is crucial to the group's success, processing the activities is also important. Processing an activity enables the participants to reflect upon the purpose of the activity and realize its practical application to real life experiences. The E*D*I*T* method of activity processing is presented to the support teachers in this workshop as a tool for working with groups or committees in their school.

Leadership Skills

The Leadership Skills Workshop (Chapter Five) provides the opportunity for the instructional support teachers to analyze their style of leadership. Each participant completes a leadership questionnaire and examines the scores in each category. From the results, they can obtain a reasonable picture of their leadership style.

The theory of situational leadership states that no one style is perfect for all situations. Certain types of leaders perform more effectively in certain kinds of situations. The support teachers examine their job situations and compare them to their personal leadership style. They are able to predict how effectively they will operate in their new situations. Adjustments in their style and/or situations may be possible.

Although there is no one "best" leadership style, there are particular leadership behaviors which are effective for most situations. Concepts such as delegation, goal setting, time management, organization and planning, and motivation of others are presented to be support teachers. They are given the opportunity to practice these skills in simulated settings and role playing situations.

Clinical Supervision

A very productive method of individualizing professional growth activities for teachers is clinical supervision. It is most effective when separated from the task of teacher evaluation. The support teacher in each school has no involvement in teacher evaluation; this is the principal's role. Therefore, it is the support teacher who can offer meaningful professional development through the use of clinical supervision in a nonthreatening manner. When evaluation is not connected with classroom observation, the teacher is free to concentrate on personal improvement.

The consultant (Chapter Six) teaches the support teachers a modified version of clinical supervision. It consists of three major steps: (1) the pre-observation conference, (2) the classroom

visitation, and (3) the post-observation conference. The participants practice these procedures in video-taped, role-playing sessions during the workshop. An assignment is given in which the teachers are asked to provide one supervision session to a teacher in their school. When they return to the workshop, they share their experiences and receive feedback. Further practice sessions are provided.

Workshop Design

When the Professional Development Committee designs its inservice program, it usually includes workshops as one type of planned activity. Many of these workshops can be conducted by the teachers or the instructional support teacher. A committee may need the expertise of a support teacher from a different school; therefore, the schools can "exchange" support teachers for a workshop. The purpose of this workshop (Chapter Seven) in the Leadership Training series is to teach the support teachers how to design an effective workshop.

There is a difference between a workshop "design" and a workshop "plan." A workshop plan usually consists of a series of events; whereas, a workshop design is the overall schema of the workshop--its goals, sequence and pacing of events, evaluation procedures, etc. The support teachers learn the six-step procedure employed by Teacher Corps in designing a workshop.

During this session, the participants are urged to create workshops which serve the specific needs of the recipients by carefully specifying the clients to be served and the problem or topic to be addressed. Setting specific objectives and selecting strategies appropriately matched to those objectives are presented.

Other skills covered are the use of an experience impact analysis to judge a specific activity's potential for producing optimal learning, pacing of strategies, processing each activity, evaluation techniques and providing followup assistance.

Summary and Comments

The professional development model developed by Teacher Corps is one which requires teacher involvement. Each school has a a committee which is responsible for developing its inservice program. The instructional support teachers play a crucial role in the support of professional growth for the teachers. With the process of teacher evaluation being severed from teacher improvement, the teachers are more open toward professional improvement. The use of peer facilitators also creates a more accepting atmosphere.

One of the most critical aspects to insure the success of this professional development model is the creation of an informal network between the instructional support teachers. They have a difficult task in that they act as support personnel to the teachers and to the principal. They must gain the trust of both groups while not violating any confidences. At the same time, they must perform their duties as effectively as possible. This type of middle position requires a great deal of professional integrity which must be maintained at all times.

The network established between the support teachers consists of informal meetings and written communication. The network provides the opportunity to meet together and exchange ideas, problems or concerns, and solutions. It allows the support teachers to share techniques which have been successful for others in the

same position, which is especially significant when dealing with an entirely new role. One of the more important results from the use of the network has been the continual motivation and support that the instructional support teachers give one another.

Chapter Two

PROFESSIONAL DEVELOPMENT

Jessica B. Leslie

Introduction

The major function of the instructional support teacher is to provide for group and individualized professional development activities. Teacher involvement in developing a school-based professional development program is a major aim. Through the use of a school committee, faculty and staff members determine their own needs and the methods by which these needs will be met. The inservice activities designated by the committee consist of both group and individualized plans. The support teacher also meets personalized growth needs through individual consultation and clinical supervision.

The purpose of the Professional Development training session is to teach the support teacher systematic techniques for developing a collaborative professional development program for the school. Consultation skills and clinical supervision are covered in other chapters in this book. The support teachers are given background information on professional development based upon current research. They examine criteria of effective staff development programs and apply them to their situations. They also learn how to organize and conduct committees, needs assessments, inservice programs, evaluation plans and school climate programs.

Professional Development Research

Research on professional development programs reveals numerous characteristics which are most effective in accomplishing objectives and creating a positive, motivating environment. These are based

upon the research listed in the bibliography for this chapter and are listed below as presented to the participants.

Characteristics of Effective
Professional Development Programs

1. Relevance to specific teacher and student needs
2. The use of internal or local resources
3. An organized, systematic approach to program design, implementation and evaluation
4. Accomodation of individual differences
5. Opportunities for self-correction and self-instruction
6. Flexibility
7. Active participation of teachers in decision-making and implementation
8. Group efforts in planning and administering the program
9. Intrinsic motivation and incentives
10. Emphasis on demonstrations, supervised trails and feedback
11. Adequate resources and time
12. Attention to attitudes as well as skills
13. Teachers providing mutual assistance
14. Thorough followup procedures
15. The use of formative and summative evaluation procedures
16. Developmental, continuous, long-term growth as opposed to short-term, "one-shot" approaches
17. Activities occurring in the setting in which learners normally work
18. Observation of other teachers
19. Support and involvement of the building principal
20. Functions of evaluation and training are clearly separated

21. Regular project meetings to review the program

22. Needs assessment on a personalized basis

23. Personal commitment of those involved

24. School-based; decentralized

25. Teachers free from threat of failure

During the presentation of the effective characteristics of staff development programs, the instructional support teachers discuss and comment on each one. They apply the research findings to the professional development model currently in use in their district.

The Professional Development Committee

One method by which the instructional support teacher can elicit teacher involvement is through the use of a school Professional Development Committee. The committee contains a representation of school personnel who remain in close contact with those persons not on the committee. It is the committee member's obligation to receive input from nonmembers, assuring that all persons have representation on the committee. All plans devised by the committee are to be approved by the entire faculty.

Varying with the individual school involved, the committee generally consists of ten members: the principal, an assistant principal, counselor, an intermediate and a primary teacher (elementary level), subject area teachers (secondary level), teachers from the support areas (e.g., special education, Title I, Title VII, etc.,) a paraprofessional, parents, and students (secondary level). When addressing the school climate issue, it is recommended that a cafeteria worker, a custodian, a bus driver and the school

nurse be included. The instructional support teacher serves as chairperson of the committee. Committee members can serve on a voluntary basis or be appointed to the position. Each member is responsible for representing and reporting to a particular group of persons. For example, the primary teacher is responsible to all of the primary teachers; the cafeteria worker is responsible to all of the cafeteria personnel; and the principal or assistant principal is responsible to the entire administrative staff.

The purpose of the Professional Development Committee is to design a professional development and school climate program for the school each year. The functions of the committee should be clearly stated in writing to each of its members. A sample of the functions used by one school is listed as follows:

1. To work collaboratively as a team to determine specific needs for professional development.
2. To design, implement and evaluate the professional development program for faculty and staff members of the school.
3. To assess the current school climate as perceived by faculty and staff, students and parents.
4. To design, implement and evaluate a program for the improvement of the school climate.
5. To act as a representative body for all personnel in the school.

Needs Assessment

There are many techniques for conducting needs assessments and many factors on which to base one. Many of the schools using the Teacher Corps model chose to base their assessment upon two

factors: student needs as indicated by student achievement scores and teacher needs as indicated by an informal survey. The committee reviews the students' achievement scores by grade level. They prioritize the academic areas needing attention and match them with teacher needs. In the case where the teacher needs do not correspond with student achievement areas, the teacher needs are listed separately on the needs assessment form.

In order to accurately interpret the achievement scores (the California Test of Basic Skills, in this case), the following set of simplified definitions is provided.

Interpretation of CTBS
Computer Printout

N= The total number of students taking the test.

RS= Raw Score

The total number of items answered correctly.

SS= Standard Score

A single scale of standardized scores (converted) to allow comparisons across all levels of the CTBS/S. The scale ranges from 0-999 and enables the user to chart a student's growth from the beginning of school through grade 12.

GE= Grade Equivalent

A score which gives the grade level functioning of the student.

N%= National percentile

A score which indicates where a student is functioning in relation to the nation as a whole.

ST9= Stanine

A standard score using nine units and based upon the raw score. Its interpretation is as follows:

9-highest level-top 4%

8-high-next 7% lower

7-well above average-next 12% lower

6-slightly above average-next 17% lower

5-average-middle 20%

4-slightly below average-next 17% lower

3-well below average-next 12% lower

2-low-next 7% lower

1-lowest level-bottom 4%

By examining the mean CTBS achievement scores, committee members are able to list the weaker academic areas of the students. The type of score used (RS, SS, N%, etc.) varies by the choice of each committee. For purposes of simplicity, the examples presented in this chapter are based upon the national percentile (N%). Once the areas of student need are identified, they are matched with perceived teacher needs obtained through an informal survey. The result is a list of topics requiring attention through various methods. For example, larger-scope problems such as low mathematics computation scores in all of the primary grades could be handled by a workshop or series of sessions on this topic. These could be followed by demonstration teaching to illustrate several teaching techniques. Problems of a smaller scope such as the need for classroom management techniques by one or two teachers can be addressed through clinical supervision and/or demonstration teaching.

Consider the following fictitious set of CTBS achievement scores in conducting a needs assessment.

Lakeview Elementary
Grade 5

	Read Vocab.	Read Compr.	Total Read	Math Compu.	Math Appl.	Total Math
N	133	133	133	133	133	133
RS	22	26	48	57	11	68
SS	433	463	440	589	409	439
N%	33	39	35	68	25	37
ST9	4	4	4	6	4	4

In this set of scores, all of the areas listed above can be considered as weak ones, with perhaps the exception of mathematics computation which, according to the stanine score, is slightly above average. Upon examining the national percentiles, a list, proceeding from the weakest to the strongest area, can be devised as indicated on the needs assessment form in Figure 2.1 and also in the list below.

Grade 5

1. Math Applications - 25%
2. Reading Vocabulary - 33%
3. Reading Comprehension - 39%

The informal survey of the fifth grade teachers reveals that the following topics are of interest to them for including in their professional development program. When matched with the student needs, the comparison appears as shown below:

STUDENT NEEDS	TEACHER NEEDS
1. Math Applications - 25%	1. Techniques for teaching word problems in math.

	2. Problem Solving of all types in math (logical reasoning).
2. Reading Vocabulary - 33%	3. Techniques for improving oral language
	4. Methods for improving reading vocabulary
3. Reading Comprehension - 39%	(no match by teachers)
	5. Discipline techniques for the classroom

The same type of comparisons can be done with each grade level so that the committee has an overall profile of student and teacher needs. A sample needs assessment conducted by the Professional Development Committee at a fictitious elementary school is illustrated in Figure 2.1. The first section on the form contains a comparison of the student needs according to the mean achievement scores and the teacher needs assessed through an informal survey. In some cases, the students in a particular school may score low in numerous areas. If the amount of time spent on professional development is not adequate for treating all of the needs identified, committee members will have to select a few areas in which to place high priority and proceed with their inservice plans accordingly. Section two of the assessment form designates the selected priorities, and section three contains the inservice schedule. Teacher Corps staff members have found that when faced with many areas of need, many school personnel schedule inservice events on days in addition to the time set

FIGURE 2.1

NEEDS ASSESSMENT FORM
LAKEVIEW ELEMENTARY

I. Areas of Need

GRADE 1

STUDENTS:	TEACHERS:
1. Letter Sounds - 22%	1. Techniques in Phonics
2. Word Recog. - 31%	2. Improving Reading Vocabulary
3. Language Grammar - 33%	3. Improving Oral Language
	4. Language Experience Techniques

GRADE 2

STUDENTS:	TEACHERS:
1. Word Recog. 35%	1. Improving Reading Vocabulary and Word Attack Skills
2. Language Grammar - 42%	2. Improving Oral Language
3. Math Compu. - 48%	3. Discipline Techniques

GRADE 3

STUDENTS:	TEACHERS:
1. Read. Vocab. - 32%	1. Improving Vocabulary
2. Read Compr. - 35%	
3. Language Mech. - 44%	2. Improving grammar

GRADE 4

STUDENTS:	TEACHERS:
1. Read. Vocabulary - 41%	1. Improving Vocabulary
2. Math Compu. - 44%	2. Techniques for teaching basic math skills
3. Math Appl. - 48%	3. Discipline techniques

GRADE 5

STUDENTS:	TEACHERS:
1. Math Appl. - 25%	1. Techniques for teaching math word problems
	2. Problem Solving (logical reasoning)
2. Read Vocabulary - 33%	3. Techniques for Improving Oral Language
3. Read Compr. - 39%	4. Methods for improving reading vocabulary
	5. Discipline Techniques

FIGURE 2.1 (cont.)

NEEDS ASSESSMENT FORM

II. Priorities

1. Reading Vocabulary - All levels
2. Language - Grammar - Primary
3. Reading Compr. - Intermediate
4. Math Applications - Intermediate
5. Discipline Techniques - All levels
6. Oral Language - Primary

III. Workshop Schedule

Date	Topic	Consultant
September 23	"Oral Language Techniques" To focus on vocabulary and grammar - To be followed by two demonstration teaching sessions before October 25 - All teachers	Ms. Linda Sanchez Consultant from Regional Service Center
October 28	(Reading In the Content Areas) - (Improving vocabulary in all of the content areas - to be followed by two demonstration teaching sessions before November 20)- All teachers	Ms. Linda Sanchez
November 25	"Make and Take Session on Language and Vocabulary Materials" (Make a variety of materials to use in the classroom) - All teachers	Ms. Linda Sanchez
December 15	1. "Improving Oral Language (Grammar and Vocabulary - Language Experience Approach) - Primary Teachers	To be identified
	2. "Improving Reading Comprehension" - Intermediate Teachers	To be identified

FIGURE 2.1 (cont.)

NEEDS ASSESSMENT FORM

Date		Topic	Consultant
January 27	1.	"Improving Reading Comprehension" (Demonstration Teaching) - Intermediate Teachers	To be identified
	2.	"Reading Vocabulary" (Group Sharing session on techniques used by the primary teachers)	Faculty
February 24		"Assertive Discipline" (Techniques for the classroom) - All Teachers	To be identified
March 31	1.	"Problem Solving Techniques in Mathematics" - Intermediate Teachers	To be identified
	2.	"Creative Writing" (Focus on Grammar) - Primary Teachers	Ms. Janice Longman, University consultant
April 28	1.	"Problem Solving Techniques - Followup" - Intermediate Teachers	To be identified
	2.	"Creative Writing" (Group Sharing session on creative stories, poems, etc. written by students) - Primary Teachers	Faculty

aside for required district inservice workshops.

Professional Development Program

Once the areas of need have been identified, members of the committee formulate a schedule of workshops, demonstration teaching, sharing sessions, etc., as recorded in the third section of the assessment form. The dates for the workshops shown in Figure 2.1 are the days predetermined by the district to be the required inservice days. Additional days may be included at the individual school's discretion either during the school day (when classes must continue) for such events as demonstration teaching, or after school for such events as workshops. In the sample schedule in Figrue 2.1, the committee has chosen to include additional sessions. These are demonstration teaching lessons for the months of September and October or November. They are to be presented in a classroom during the regular school day while the teachers team teach or utilize substitutes or certified volunteers to conduct their classes during the time they are attending the demonstration. A demonstration lesson can be provided several times throughout the day so that all teachers are not removed from the classroom at any single time. The same type of session may only be needed by a small group of persons in which scheduling poses no major problems.

In the sample needs assessment form, it is evident that some of the needs identified were pertinent to some groups of people and not to others. Therefore, the professional development program was arranged to avoid having personnel attend unnecessary workshops which are irrelevant to their positions. For example, in December, the primary teachers will attend an oral language workshop, and

the intermediate teachers will attend a reading comprehension workshop because the needs assessment revealed these individual areas of concern. The result is an individualized, relevant professional development program which is "owned" by the school faculty and staff.

In actuality, this inservice schedule constitutes only a portion of the professional development program. Utilizing the results of the needs assessment and personal requests by the teachers, the instructional support teacher is able to offer meaningful clinical supervision. It is provided as an on-going process, described in Chapter Six, throughout the school year. Through the use of the clinical supervision model, highly individualized growth plans can be devised between the support teacher and the other person involved. When not used as an evaluation technique, but in a confidential manner, clinical supervision has the potential for producing immeasurable results.

School Climate

The second major function of the Professional Development Committee is to investigate the school climate and design a program to address the findings. The process used is a simple one--develop an instrument to assess the climate, administer it, analyze the results, design a program to make needed changes, readminister the same questionnaire and examine any successful alterations made.

Near the beginning of the school year, the committee members meet to construct instruments for examining the climate of the school. A separate, but similar, instrument is written for the

faculty and staff, the students, and the parents in the surrounding community served by the school. Items are written in the form of a statement with a number scale provided for rating the extent to which the statement is true or actually occurs. The topics included on the questionnaires vary from school to school, but on all three instruments, there are generally five categories under investigation: school administration, curriculum and resources, physical facilities, interpersonal relationships and community involvement. The administrative category usually consists of items concerning school policies, management techniques, effectiveness of the counseling program, health services and other components dealing with the management of the school. The curriculum and resources section contains items inquiring about the school's curriculum, resources available and quality of teaching and learning, while the general appearance and quality of the physical facilities, as well as their maintenance and availability, are included in the section on physical facilities. The interpersonal relationship category not only covers interpersonal communication and the availability of opportunities to work as a team, but it also inquires about general feelings or morale. The section on community involvement asks about the presence of parents in the school, their involvement in school activities and their children's education, and about their feeling welcome to participate.

The first draft of the instrument is shared with the faculty and staff, a group of students and a group of parents. They are encouraged to provide feedback on the surveys through written or oral comments. The committee reconvenes to complete the final form of the questionnaire and subsequently distributes it to all

three groups.

Committee members either tabulate the results by hand or have them analyzed by a computer. The results are shared with all three groups--faculty, students and parents. To simplify the results for examination, it is helpful to rank order the items from highest to lowest or from positive to negative. Doing this enables the viewer to easily select the most positive and the most negative aspects of the school's climate. From this point, committee members are able to design a plan, upon approval by all three groups, which highlights the positive points and alters the negative ones. If the survey reveals that parents feel unwelcome in the school unless called there for a problem that his or her child is having, then the committee may suggest that frequent activities be scheduled which involve parents for positive reasons. A volunteer work program can make parents feel not only welcome, but also needed for the daily functioning of the school. Seemingly small events often turn opposition into strong support for the school. A carefully planned program to improve school climate can significantly alter school and parental morale, resulting in a better environment for optimum learning.

Changes in the school climate can be ascertained by administering the same instruments near the end of the school year. Using the information gained by a comparison of the posttest with the pretest will enable the committee members to note successes and problems which may need further attention. A tentative plan for the following school year can be outlined.

Evaluation and Followup

Both formative and summative evaluation techniques are used in this professional development model. Attending to followup is a significant part of the evaluation method.

Formative evaluation is used so that continuous assessment of the program is provided throughout the school year. Each activity is evaluated immediately after it occurs, utilizing the evaluation design presented in Chapter Seven. The results are analyzed and made available to the consultant, the Professional Development Committee and the entire faculty and staff. Immediate evaluation results make it possible to make adjustments to the program and provide followup assistance when and how it is warranted. If, for example, it is discovered that the session on oral language was too short to adequately cover the topic, a followup session can be sheduled in place of a demonstration session, or a demonstration lesson can be arranged as a followup to the oral language workshop. Followup assistance can also be very effectively handled through individualized clinical supervision.

The evaluation results may indicate a need to revise the inservice schedule. It should be flexible enough so that adjustments can occur smoothly as they are needed. Formal instruments and informal comments made concerning the program should be carefully considered. They can help keep the professional development program relevant and useful.

Summative evaluation aids the committee members in examining the overall program near the end of the school year. A combination of techniques, such as group meetings and informal surveys, should be used. A compilation of the formative evaluation results serves

as one means of evaluating the workshops and various types of sessions. A survey on the overall program will identify the more effective components. The need for deletions, additions or changes in the use of the committee, needs assessment, particular types of sessions, evaluation instruments, clinical supervision, or school climate program will become apparent with a thorough evaluation method. A careful evaluation and followup will greatly enhance the planning and effectiveness of next year's program.

Summary

The instructional support teacher has been placed in charge of his or her school's professional development and school climate programs. The Professional Development workshop was designed to provide the support teacher with skills and methods for organizing and implementing inservice programs. The method presented is based upon research which indicates that such a program will be more successful if the recipients of it are partially responsible for its design and outcomes. Therefore, a committee approach is adopted in which school personnel, students and parents play a crucial role and, in fact, feel an "ownership" of the programs.

Members which represent all three populations serve on the Professional Development Committee. Their duty is to perform two major tasks: develop and implement a school-based professional development program and school climate program.

For the formulation of the professional development program, committee members conduct a needs assessment based on student achievement scores and perceived teacher needs. From these results, they design an inservice program to address the needs. Careful

evaluation enables the committee in adjusting the program as needed and providing timely followup assistance.

The school climate program also involves school personnel, students and the community. A survey on school climate as perceived by all three groups is conducted. The results lead to a program to correct problem situations, and near the end of the year, the survey is readministered as an evaluation and followup procedure.

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Chapter Three

CONSULTATION SKILLS

Phillip C. Moyer

Introduction

Consultation skills are included in this training program to provide the instructional support teachers with the understanding and tools for promoting change in systems. Their job is to provide assistance to faculty and others who could improve the quality of teaching and learning in the schools. If these support teachers can become effective consultants, they can help faculty identify goals and objectives as well as roadblocks to their accomplishment.

Often problems occur not in the instructional methodolgy but in relational and communication systems between teacher and student and among students. Consultation training is aimed directly at problem solving in instructional systems, whatever the nature of the dysfunction. The instructional system includes all the interactions between teachers, students, parents and the community, e.g., teacher to faculty, teacher to student, teacher to class group, student to student, teacher to administrator. Consultants are also expected to be able to facilitate improved instruction by attending to general environmental conditions that support learning and teaching. Environmental conditions can be analyzed and improved by employing effective group consultation skills.

Consultation is taught to enable the consultants to be effective in dealing with both individual and organizational concerns. Individual systems include working with a teacher to improve instruction by attention to "content-teacher-student-significant

others" as a system. The focus is the teacher and his/her goals and roadblocks. The organizational system focuses on helping consultants to be able to analyze potential goals and problems that are departmental (or grade level) or school wide in nature. Departmental concerns often revolve around staff relations, curricular offerings, learning climate and the physical setting.

Training Design

The consultation training is usually one of the first training components for a new group of instructional support teachers. It provides an opportunity to demonstrate some important elements of effective consultation. Among those elements are two that seem critical. The first is team building. People who will work together on an ongoing basis and who will depend on one another for group as well as individual effectiveness need to develop a team concept. The design is developed to help participants learn to value and trust each other and to engage in work related risk-taking. In this workshop, this is done by warm-up, get acquainted exercises and by using a variety of dyad, triad and small group activities throughout the training session.

The second element demonstrated is agenda building and personal goal setting. After introductions and some warm-up activities, the participants are asked to share what they know about consultation. They respond to the question of "What is consultation?" A word association is done to connect words associated with "consultation." All of this is recorded on newsprint to provide a baseline of beginning perceptions of consultation. The usual perceptions of consultation include something like, "An expert comes in and

tells you what to do."

The next step is usually more difficult. Participants are asked what they want from the trainer as a consultant. The responses usually suggest that the consultant should tell them how to do it. At least 20 to 30 minutes is devoted to listing specific problems and concerns that they, as individuals and as a collective group, have for consultation. After the participants are clear about their beginning perceptions of and needs for consultation, the trainer provides input about the nature of consultation processes and procedures. Great care is directed toward relating the consultation model and uses to their already identified needs for consultation. All of this attention to agenda building and goal setting is done to increase motivation and receptiveness to the training that follows.

The remainder of the workshop is designed to provide a balance between theory and practice. Presentations and demonstrations are balanced against experiential sessions in dyads, triads and small groups by the participants. Experiential sessions are structured to provide feedback to the participants before the next session. Summaries after each skill and theory session focus on how their needs can be met, as well as how they can apply these skills to others back at their work site.

Followup sessions to the intensive training take place after the trainees have been on-the-job for several weeks. At least two such follow-up sessions each separated by several weeks are provided to insure the likelihood of integration of the training into practice.

The Consultation Model

The consultation model includes three components: theory of process consultation, communication skills, and problem solving. Each of these concepts is treated separately in the following sections.

Process Consultation Theory

The consultation model advocated was first identified as process facilitation/consultation in a paper authored by Ben Strickland and John Arnn of Texas Christian University. As noted earlier, the most common understanding of consultation is that a consultant is sought when something is wrong or a problem exists. More often than not, the consultant is expected to observe the situation, and make an analysis of the problem, diagnose the cause and prescribe a remedy which if undertaken will resolve the problem. Thus the consultant is typically perceived as having not only great problem solving ability but expertise specifically related to the nature of the problem. This may work effectively but is highly dependent upon: (1) the proper selection of the consultant for the task at hand, (2) the amount of money the consultee may have which dictates how thorough the consultant can be, and (3) how skillful one person (the consultant) can be in assessing, planning, and suggesting a course of action that the organization and the staff can effectively implement. The success of the "expert model" of consultation with its product orientation is highly dependent upon the commitment that can be made by the consultee to follow the prescribed remedy. Not infrequently, the suggested action is on target but the consultee or other people involved

lack the skills, interest or commitment to the solution. In short, the expert model is highly dependent upon advice giving, and nearly everyone that has experienced it agrees that the advice is often more suited to the giver than the receiver. This is not to suggest that the expert model of consultation is never appropriate, only that it is often overused and easily abused by both consultee and consultant.

The consultant who employs a process model depends upon expertise in problem solving. S/he is highly skilled at facilitating problem solving by the consultee. The central task is to develop the consultee's skills needed for problem identification and/or goal setting to design a realistic action plan within the capability of the consultee(s) to carry out and, finally, to assist the consultee with the development of an evaluation plan to gather feedback about effectiveness of the changes. The process consultant becomes an invaluable resource person whose contribution is assisting consultees in their own problem solving, goal setting and resource development. The strength comes from within the consultee or consultee group. The expertise is a collective expertise that is already present but unrecognized and is developed where needed from the available personnel. This collective expertise remains long after the consultant has departed. Thus, the responsibility for improved outcome is shared by the consultee and the consultant. Interest and commitment to the course of action needed to bring about change is more likely to exist when participants have been involved in the establishment of the plan.

There are six goals of the process consultation model. They

are cited directly from a handout in a workshop given by Strickland and Arnn (1976).

1. Improving communication. Communication networks are always in need of improvement. Confusion and non-communication are more often the results of such systems. Individual communication skills must continually be evaluated. Instructional and individual communication never reach a state of perfection.
2. Clarifying roles and responsibilities. Misunderstandings frequently arise when individuals carry out their roles and responsibilities appropriately. Clarification is necessary on a continuing basis.
3. Teaching problem solving or decision making. The ability to solve problems or make decisions is frequently taken for granted. This assumption creates regular conflicts in institutional settings. These skills can be taught.
4. Developing leadership and followship. Effective leadership can usually be identified and encouraged. Sometimes it appears in appointed leaders and sometimes in spontaneous leaders. Leadership is essential to the success of any institution and must be continually developed, expanded, and nourished. In addition to needing leaders, institutions need effective followers. Conflicts must be identified and overcome. Each person must feel that he or she is an important part of the institution regardless of position.
5. Encouraging institutional growth. Institutions must continually expend energy toward growth or expansion in order to avoid regression. Processes and procedures must be refined and

replaced. Group or intergroup processes must be improved. The institution must function as a unit, not merely as a collection of individuals.

6. Encouraging individual growth. Individuals must continually grow if the institutions they comprise are to grow. Mechanical, as well as interpersonal skills must be developed and maintained. Interpersonal skills generally need the most encouragement since these are more difficult for individuals to assess than are mechanical skills.

Three of the above goals speak to the development of skills and attitudes required for more collaborative and coopertive action by consultees. The attention to more effective group behavior is evident. Elements of communication, leadership, problem solving and receptivity to personal and organizational change are goals of the process consultation model. These elements must be brought into focus by the consultant.

Finally, a set of five rules exists for consultation that must be observed. The first rule is to develop a plan that can guide consultant actions in a variety of anticipated settings. The plan is primarily a problem solving model that provides a means of assessing not only where one is but where and what one anticipates doing next.

Secondly, the consultant should follow procedures that have demonstrated positive effects. Success in problem solving more often than not is the result of deliberate and systematic application of a set of problem solving procedures. Following a set of procedures enables consultees to learn problem solving. The process consultant must help consultees to develop resources so that they can become

increasingly self-sufficient.

The third rule is to engage in those procedures that teach consultees to identify and develop resources. This step involves teaching processes that may be employed to expand the number and variety of techniques, materials and other resources. Resource expanding techniques to be acquired by the consultee include group facilitation, brainstorming and the use of the nominal group technique.

The fourth rule for process facilitation/consultation (PFC) is that the consultant must function as a model for consultees and help them become aware of the behavioral modeling. The consultant must be able to demonstrate those problem solving behaviors that s/he expect of others. This is not to suggest that the PFC must be all things for all people. The consultant must work within their known strengths and limitations. Important characteristics to model are self-awareness, self-acceptance and willingness to seek assistance when necessary.

The fifth rule is that objectivity must be maintained by the consultant. Commitment to pet solutions, whether one's own or someone elses, often complicates the process of finding a satisfactory and practical course of action for a specific need. The needs of the consultee must be impartially investigated. Consultees need assistance in looking beyond existing psychological and social barriers to potentially useful new ways of doing things or new ways of conceptualizing present practice. Objectivity enables the consultant to analyze and deal effectively with barriers rather than to become absorbed by part of the closed environment.

Communication Skills

Communication is particularly important to process consultation. Good communication skills for the consultant are essential if this consultation model is to be successful. Two communication skills are taught to consultants: attentive listening and facilitative responding.

People who are unaccustomed to assuming a helper role are more often interested in responding than listening. The most common response of untrained helpers is advice-giving followed in order of frequency by interpretation and analysis of problems. While these responses may at times be helpful, they are overused and too often premature in the helping process. People in training to become consultants (helpers) feel compelled to do something to help others solve problems, make decisions and develop new behaviors. The naive consultant believes it is imperative that s/he "step in" and provide assistance in an active manner. Experienced and successful process consultants have learned that what is frequently needed is for the consultees (individual or group) to hear themselves. The mechanics of feedback of words spoken, behaviors observed, and feelings expressed provide important data to problem solving and decision making. This feedback may facilitate greater awareness and understanding of environment and psychosocial dynamics related to individual and group needs and behavior.

Attentive Listening. The consultation training process must help trainees to appreciate and develop the most critical skill for the process consultant: attentive listening. The ability to accurately hear the consultee's messages set the stage for facil-

itative responding and problem solving strategies. Many guidelines for listeners have been offered to promote better listening habits. Among listening guidelines, the ones that follow are worth careful consideration:

1. Focus on the person who is talking. This includes directing eye contact and posture toward the consultee as well as directing all of one's mental energy toward the talker. These behaviors demonstrate common interest and concern. It is important to eliminate distracting thoughts and preoccupations from one's mind.
2. Be aware of the feelings of the talker. Messages are related to emotional states and conditions of the speaker. The content of what is said may make little sense if the feelings of the speaker are not known. Listen for emotional reactions and attitudes. It may be helpful to ask yourself how the speaker must feel to be saying these words. These feelings provide the consultant with a better understanding of how the consultees perceive their world.
3. Avoid judging and evaluating the speaker. Consultants must guard against labeling a person based on evaluations and judgements. In addition, these more often reflect knowledge of self rather than knowledge of the speaker. Do not assume that the speaker uses words and gestures the same way as you. Neither can one assume that the consultee has the same values, strengths and weakness as you.
4. Be a selective listener. Try to identify content and affect themes of the speaker. These are variations of messages

that are repeated and contain similar content or feeling. These themes are not always known to the speaker in informal conversations. The consultee may acquire new insight and understanding when a consultant identifies and shares these themes. It may also be helpful to point out the absence of themes when this is apparent.

5. Separate the person from the idea. Some individuals tend to be influenced as much by who is saying something as they are by what is being said. A consultant must be aware that s/he may react more positively to something when said by a person who is liked than when the same thing is said by a person who is not liked. Ideas expressed by someone we like may also be perceived as agreeing with our own. Because it is difficult to separate the person from the idea, we must listen more closely when the speaker is perceived either negatively or positively. One thing listeners can do is pretend that the speaker is someone else who elicits no strong feelings or elicits the opposite feeling, "What if this were John saying..."

6. Listeners must not let their emotions dictate their responses. A facilitator of communication must be careful not to get so upset or angry that they cannot hear the speaker's message and respond objectively. Strong emotional feelings about the speaker may block accurate understanding. This is not to suggest that strong emotions are never allowable, only that those emotions must be separated from the listening process to enable hearing and understanding. Speakers may

profit by awareness that they stimulate/elicit strong feelings --pleasant or unpleasant. The feedback should be delivered in a nonjudgmental and nonevaluative manner.

Regardless of the guidelines and suggestions offered for good listeners, the essence of good listening is dependent upon the consultant's genuine interest. Consultants must be concerned about the life and circumstances of the consultee. They must genuinely want to learn about the consultee's thoughts, feelings, values and concerns. They must also believe in the right, power and responsibility of the consultees to bring about necessary changes in themselves and in their circumstances. What most consultees need is to hear themselves and to understand the organization of their own thoughts and feelings.

Facilitative Responding. This section is about how consultants can respond to counsultees and how they can promote the establishment of a helping relationship. The quality of listening and responding directly affects the perception of the consultant by the consultee. Those consultants who are perceived as helpful are more apt to facilitate change, and some types of responses have been demonstrated to be more likely than others to foster development of a helping relationship. These responses have been called "facilitative responses" by Wittmer and Myrick (1974, p. 53). They have categorized a set of responses from least to most facilitative as follows:

1. Advising and evaluating
2. Analyzing and interpreting

3. Reassuring and supporting

4. Questioning

5. Clarifying and summarizing

6. Reflecting and understanding of feelings

It should be remembered that all of these responses may at some time be facilitative but that they are so ranked because of their probable effect in establishing a helping relationship.

The first three types of responses are perhaps the most frequently used responses by untrained helpers. Even trained helpers have difficulty reducing the frequency of these responses and often use them prematurely. Used early in a process consultation, they tend to detract from the consultant's credibility as a genuinely concerned person. These responses communicate consultant control of the relationship and a top-dog/under-dog status. The advising or evaluating responses imply a judgment of relative goodness, appropriateness, or effectiveness within the consultee's thinking, feeling or doing. Advising and evaluating suggests what the consultee should be doing. These responses tend to be overused and based more upon what the consultant could and would do given their limited understanding of the situation. Unfortunately, the consultee often is unaware of the consultant characteristics and perceptions that make the advised action the plan of choice. The danger in use of these responses early and too often in a relationship is that the consultee may experience dependency and deficiency, hardly the status intended by a competent consultant.

The analyzing and interpreting responses indicate an intent to develop insight and show meaning by explaining or connecting

ideas and events. It suggests the "real" reason and motives behind thoughts and actions of the consultee. ("You left the room because you thought no one really appreciated your point of view.") The use of "because" is often a clue that identifies the use of an interpretation or analysis.

Reassuring and supporting responses suggest that the consultant knows better than the consultee the appropriateness of a feeling or thought. These responses imply that the consultee need not experience a particular feeling or the intensity of feeling. They are often used to pacify a person. ("Don't worry, you'll feel differently tomorrow.") More often than not the consultee could profit by a clearer understanding of what exactly they are experiencing and what meaning those feelings/thoughts have for them.

Questions are also popular helper responses. Questions that keep the focus on the consultee and his/her thoughts, feelings, and actions are more facilitative than those which lead to generalized topics. Open-ended questions are more productive and facilitative than closed questions. (Open: "What is the status of the departmental goals to date?" Closed: "Have the departmental goals been accomplished?") Consultants in training can profit from practice in asking more open-ended questions and in recognizing and reducing the number of closed questions. Group and dyadic practice can be provided to encourage asking questions that begin with: What, where, how, and when. Questions communicate that the consultee should develop a point further.

Summarizing and clarifying statements by the consultant indicate an intent to accurately understand what the consultee is saying

or to identify the significant themes (ideas, feelings) that are developing from the conversation. These responses communicate a sincere interest in checking out what the speaker has said. They enable empathic understanding to be verified. Consultees need to know the specific nature and content of what a consultant believes to be understood about the consultee. ("You think that this paper you're writing is terribly important to you?") These responses contribute greatly to the credibility of the consultant as a genuinely concerned person.

Understanding and reflecting responses most often convey that the consultant understands the feelings and ideas of the consultee. These are responses reserved for those times when, after clarification, the consultant understands the totality of his/her client. The consultant communicates accurately how the world appears to the consultee. ("You're discouraged with your progress right now. It seems like you can't stick with your priorities.")

Summary. This section describes the major communication skills of attentive listening and facilitative responding. These skills, in large part, determine the quality of the relationship that will develop between the consultee and the consultant. Those consultants who listen attentively and use a greater proportion of high facilitative responses will be more likely to establish effective helping relationships. While these tools are especially important in the relationship establishment stage of consultation, they continue to be essential throughout the duration of the consultation.

The Problem Solving Model For Process Consultation

This section describes the steps and stages in the consultation process. These steps rest upon a foundation of the goals, rules, and procedures of the process facilitation/consultation model and upon the communication practices described in earlier sections. Several authors have described steps and stages of the consultation process. Nearly all writers agree that consultation should proceed through a series of steps (phases) in an organized approach to bringing about change. The structured approach described in the steps lends direction to the process and incorporates specific activities and evaluation of outcomes. Consultation steps are usually closely related to the steps followed in any problem solving model and include: recognition of a problem or need, problem formulation, producing proposals for solutions, forecasting consequences, testing proposals, action planning, taking action steps, and evaluating outcomes. In addition to the problem solving steps, there are prior and followup phases that include establishing initial contact with the consultee, defining the consulting relationship, and establishing a method of work. After the problem solving phase comes the reducing of involvement, and finally the termination stage. While the pre and post problem solving stages are recognized, they will not be developed as separate stages in this paper.

The model described in this section lends itself well to working with an individual consultee or a group that may constitute a departmental or building faculty. When working with a group of consultees, particular attention will need to be paid to the

issues described in the chapter on Group Facilitation by Myers. In this consultation model, there are five steps that were first described by Strickland and Arnn of Texas Christian University (1976).

1. Needs identification, goal/objectives statement.
2. Identification of obstacles.
3. Development of an action plan (Strategies).
4. Implementation - Action taking.
5. Evaluation of outcomes.

This series of five steps can be identified by the acronym NOSIE. Strickland and Arnn developed a series of questions that a consultant can employ to focus attention on the stages. These have been used with success by consultants-in-training and experienced consultants.

Step 1: **How would you like for things to be?**

The first step in any consultation is to identify what is not happening as it should be--usually stated as a problem or concern. The listening skills and high facilitative responses are especially important at this step. Regardless of the problem inititally presented, the consultee needs to talk about the problem including their thoughts and feelings. The time required at step one is proportionate to the nature of the problem and the intensity of the emotions (Myrick, 1978). Consultants who rush in with solutions before the consultant has had a chance to tell his/her story will encounter resistance in the form of "Yes, but...," or "Well, but let me tell about something else too..." These statements

are indicators that the cathartic experience for the consultee is incomplete. The consultee needs evidence that the consultant genuinely understands the problem and the consultee.

The use of clarifying-summarizing and reflecting responses is critical, espcially in the early relationship building stages of consultation. These responses also help clarify the problem or need of the consultee, and it is possible that the presenting problem may not be the one that eventually will receive special attention. The most common error of new consultants is to assume that the consultee has clearly identified the problem and is committed to solving that problem without further exploration. Step one may be repeated at any point in the consultation process. Repeats of step one continue to clarify the problem or need and to explore other potential concerns that become evident as the process continues. It is important that consultants develop a variety of questions to facilitate step one. ("What would you like to have happening?" "If things were going your way how, would they look--where would you be--what would you be doing?")

Step 2: **What keeps number one from happening?**

This step focuses on obstacles that are known to the consultee. The consultant's task is to help clarify the nature of the obstacles and their relatedness to the identified goal/need/problem. Obstacles that were not previously identified and additional needs and goals may be discovered at this step. Sometimes as obstacles are explored, the consultee becomes aware that a more pressing need exists. The presenting problem or need may not have significant obstacles to its remedy or achievement. This discovery permits a fresher

look at the source of dissatisfaction or concern.

As in step one, the consultant still depends heavily upon clarification and summary and reflection. In addition, the consultant must employ selective listening skills to identify themes. The talk at this stage is usually rapid and many ideas, feelings and problems are presented. These expressions are not necessaily linked together logically. The consultant cannot respond to everything but should help identify themes of recurring content and feeling. This is a good time to explore what the consultee has already done to remedy the problem or achieve the goal. It is also helpful to ask for descriptions rather than judgments and to encourage recall of specific behavior for illustration. "You feel you don't stand a chance of getting... Tell me some of the things she does than convince you that your plan will not be considered seriously."

Step 3: What can you do to overcome the obstacles?

This step is concerned with development of strategies related to obstacles that block the solution to problem, the accomplishment of goals, and the resolution of needs. This is an appropriate time to discuss things that the consultee has already tried if this has not already been done in step two. In any case, the use of fantasy can be helpful in step three to uncover the consultee's strengths and limitations. ("Tell me some things you can see yourself doing to overcome...and to achieve....") As many ideas as possible should be generated before evaluation of their practicality is encouraged. At times, problems exist because the change strategies are too limited and restricted and a new approach

to bringing about change is needed. Both the nominal group technique and brainstorming are techniques that may be helpful at this stage. While both of these are usually thought to be group techniques, they can be modified for use with individual consultees.

After several strategies for change have been listed, the forcasting can begin. It is now appropriate to encourage the consultee to evaluate which strategies are more likely to succeed. If a strategy is particularly attractive or desirable but the consultee is skill-deficient, it may be appropriate to include a skills building program for the consultee to enhance the chances of success with that strategy. This step must include forecasting consequences for both the consultee and the other elements of the system to be affected. A force-field analysis may be helpful in evaluating potential consequences. The analysis is more useful when values are attached to the items included in the list. Clarifying, summarizing and reflecting are important as this step is concluded.

Step 4: What are you willing to do now to initiate number three? When? Where?

This step attends to the action-taking by the consultee. The specific actions are identified from the plan formulating during step three. Any skills that the consultee will need to acquire are specific and plans for development are made. As the action steps are taken, it is important to get feedback and alter the plan if necessary. Plans should include how to gather support for the actions to be taken. The consultee should be prepared for the possibility that resistance may occur among others affected by their actions.

It helps to establish a time schedule for the various parts of the plan. A target date should be set for initiation of the plan and a date established for a followup meeting between the consultee and consultant. A format that has been found helpful to follow in step four is presented below.

Actions to be Taken to Facilitate Problem Resolution

Goal/need/problem_____

_____

What will be done?

How will it be done?

When will it be done?

When an implementation can be described according to this format, it is more likely that it will be attempted. Those plans that do not include the what, how, and when descriptors are probably not realistic next steps.

Step 5: How will you know if step number four has been successful? (Evaluation)

The evaluation and followup step is critical, and plans should include a time schedule for meeting with consultee for feedback. When someone is attempting to change their attitudes, thinking, feelings, or behavior, they may experience awkwardness and embarrassment. During these times, the consultee will experience a sense of support and encouragement by having an opportunity to talk about the change process and results. This discussion can

be very stimulating and reinforcing for both the consultee and consultant. A realistic time should be established so that evaluation of the actions taken will occur. It is important that realistic process and outcome measures be established during step four and associated with specific actions. If necessary, the consultation process may return to any earlier step.

Summary. The problem solving phase of the consultation model consists of five steps. These steps constitute a structured process that has served well many consultees and consultants. The structured approach to problem solving is a model that consultees may use for future problems and needs when a consultant is not available.

Summary of Consultation Skills

Consultation takes time. It also requires planning and focus. It requires genuine interest and commitment to the helping relationship. Effective consultation requires a consultant who is skilled at listening and facilitative responding to establish the required helping relationship. The consultant must be able to establish trust, inspire confidence, and draw out ideas. S/he must be sensitive to feelings and appreciate the impact of emotions on problem solving and the change process. The effective process consultant must believe in the ability of the consultee to take responsibility for his/her own problem solving. The consultant's role is to facilitate exploration and understanding of the concern and to bring into focus the necessary resources. Myrick (1978, p. 59) has said:

> ...a systematic approach with all consultees, no matter how much time is available, has a higher probability of success than attempts by the consultant simply to be a good listener and then offer a few tried and tested behavioral recipes.

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Chapter Four

GROUP FACILITATION

Gail E. Myers

Introduction

Most of our work is done in groups. Only those very rare individuals who either live as hermits or have a job which entails no contact with others can survive without a constant association with groups. As groups work, they follow some patterns which are predictable and which can be therefore anticipated and adjusted to. To the student of group process (or group dynamics), there are few surprises as groups get together to solve problems or manage their affairs. Making use of what is known about groups can help the support teacher's functioning on the job and in their daily social and professional contacts.

Invited to help change the behaviors of others, too often we simply resort to telling horror stories about the "old ways" of doing things and then tell about the "new ways." Telling is only partially effective. Use of experiences to demonstrate new behaviors -- and to have people participate in different behaviors--seems to be effective with many groups. Calling this system "experiential" gives us a name which implies that the people involved are given an experience, and will consequently learn from that experience, so new behaviors will result. Under ideal conditions, we can expect that to happen. Ideal conditions include (a) desire on the part of the participant to change a behavior, (b) an experience which clearly illustrates how a new behavior can be applied, (c) discussion of implications for maximum cognitive understanding

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of the principles, and (d) social reinforcement from other group members. It is this writer's conviction that although one-on-one learning can be cognitively effective, it lacks the richness of a variety of analyzable behaviors in a group setting and also lacks the support and reinforcement from the rest of the group in an attempt to incorporate new behaviors into one's repertoire.

In this workshop, the instructional support teachers are given experiences which can be shared with other teachers individually or in groups. This chapter contains the concepts on groups and group facilitation which were presented to the instructional support teachers. The support teacher's role in relation to the professional development model described in Chapter One requires the extensive use of groups. Through group and committee work, a collaborative effort with teacher involvement can be attained.

Definition of Groups

Scholars have proposed various definitions of groups. Mostly these are attempts to distinguish between a bunch of people who happen to be collected together (such as waiting for a bus, or sitting together in a movie). One writer (Robert Bales, 1950) has said that people need to be in interaction with each other and be involved enough in an activity that later they can remember the others were present. George Homans (1950) has defined groups in terms of who spends most of his/her time with others in interacting. In that definition, you can identify groups by watching who goes to what other people for communication. Other things have to happen also, these writers, admit. But when people interact,

there are many other things happening which can identify a group in contrast to a collection of individuals. Here is a summary of what most researchers and analysts of group dynamics say define a group. Four things have to happen:

1. There must be interaction - Talk, process, communication, whether verbal or nonverbal, and people paying attention to each other.
2. Goals must be identified - The group has to have a purpose (if only to have fun) in order to maintain interaction and be called a group.
3. Norms must be identified - Unless a group establishes norms (or rules of associating), then it is difficult for them to accomplish goals.
4. Structure has to be developed - Some kind of leadership patterns must be established, attraction patterns identified, and an order for communication must be structured and assigned. A structure helps reinforce the norms which, in turn, make the goals possible.

A group, for this chapter, will be defined as a collection of two or more people in interaction, with identified goals and established norms, operating with some supporting structure. (Some group dynamicists do not consider a dyad, or two people, a group; but we prefer to count any number more than one as potentially a group.)

How Groups Work

Most of us have experience with groups. There is some cynical mythology about groups such as: "A camel is a horse which was

designed by a committee;" or, "Committees are groups which keep minutes and waste hours." Because many groups function badly and our experience with them may have been less than satisfactory, we have developed some critical judgements about all groups which should be applied to only some groups. There is also some feeling, among the self-determinant and aggressively individualistic persons, that meetings are all a waste of time and that one person should do the job and assume responsibility.

In spite of this negative folklore, there are good groups; there can be good meetings; there are good committees. Most group dynamicists argue that although group discussion and interaction is not the solution to all our human relations and learning problems, when it is well done, group process has many good outcomes.

Facilitating groups can, therefore, be a most rewarding experience instead of a frustrating one -- can succeed in real accomplishment of getting good decisions even though it may take time -- can succeed in developing member commitment, personally and emotionally, to group results as well as increasing the scope and understanding of members intellectually.

Expectation Inhibitors

What usually inhibits the success of groups can be categorized in two problems. First, there is the problem of our expectations of what we think should happen. These are (a) unreasonable expectations of the possible outcomes; (b) unrealistic expectations of the time it takes to conduct the give-and-take of group activity; and (c) uninformed expectations of what should be going on when the group gets together.

Unreasonable Expectations of Outcomes

We want groups to not only bring together all the resources of the people involved, but also to have them assume responsibility for some action and follow-through. Most groups cannot execute policy, although they are valuable in helping set policy and in interpreting policy. Groups may make laws to govern whether or not people can steal, kill or drive a car wherever one pleases; but when it comes to enforcement (the actual carrying out of the policy), that is a responsiblitiy of a hired functionary -- like a policeman. If we expect groups such as committees to actually take action which carries out the final responsibilities of their deliberations and problem solving, then we expect too much. That final action usually must be delegated to someone. Let us keep our expectations of groups within reason then, and the group will be a more satisfactory experience. Groups can solve problems by generating rational and workable solutions; they can recommend actions; they can suggest the most advantageous methods of doing something. Most of the time the efforts of many people can develop more viable solutions than any single member of that group can by working alone.

Unrealistic Expectations of Time

Groups take time. We use an exercise in training programs which involves the one-way and two-way communication, or order giving. What we find out in this exercise is that we arrive at better conclusions (in the case more accurate drawing of the figures described by the ordergiver), but it takes about twice as long to do the job. To tap the resources available in any group will

involve both a sensitivity among members as to who knows what will be useful to share and also a dedication to taking time to hear from people in the group confirm and support their participation and weigh all the inputs. If you do not have time to spend letting people talk over the problems and solutions, then you cannot expect a group or a committee to do that job. If you are in a big hurry to get a solution or arrive at a decision, then you had better just turn it over to one person and trust to luck that the chosen person has the knowledge, the resources, the commitment and the energy to solve the problem for everybody else, and also the tough skin to withstand criticism from those who would do it another way.

Uninformed Expectations of Group Process

Somewhere way back in our early training about doing things together, we got the idea that it should be all work -- no time for fooling around. In other words, you had a task to do, and anybody who did not tend strictly to business was not helping. That assumption about working together might be stated another way-that we think that everybody leaves their emotions and feelings outside the door when they come to a meeting of groups, committees, or classes. Much as we would like to be only intellectual beings (without any gut-level involvement in a situation), we do not act that way. As we interact with each other on a task, we do damage to our relationships. Idealistically, we can all be one big happy family if we all agree all the time on all issues and have only the most pleasant and friendly way of putting our arguments or handling discussion. Nothing can be further from the way things

work. We either already have an opinion on most issues or are ready to form opinions very quickly. Once we take a stand, the potential exists for our getting upset when other viewpoints are expressed. Watch any group to see how much time is spent in actually getting the task performed and how much time is spent in the process of establishing and keeping good enough relations so the task can get done. Studies of groups over many years and many different situations have shown us that groups tend to spend a little over half their time in task efforts (doing the job) and a little less than half in maintaining their relationships so that they can do the job. The ratio of about 60% task and 40% process exists in newly formed groups as well as those which meet at predictable intervals.

Imagine a new group which is meeting for the first time. A good time is spent in "small talk", introducing ourselves, getting to know one another, talking about outside interests. All these items help us prepare for the group's task and are necessary if we are going to effectively interact with those other people.

Groups which meet regularly also spend time establishing, revising, or reinforcing the personal relationships of the participants. Notice what happens, for example, if last week's meeting really did a lot of work; really accomplished many task items. (You can also probably observe that last week's meeting did not spend much time maintaining relationships among members.) If that happens, you can predict the next meeting will spend a lot of time repairing hurt feelings, reassuring each other that the decisions were good, and that the pushing around some members received was necessary and that all members are still friends.

If you do not recognize task-and-process as a necessary and useful pair of group activities, you will have trouble. If you are a task leader who wants only to follow an agenda and railroad through the items in their proper order, then you will be bothered by any process or maintenance activities such as humor, asking for opinions of silent people, and talking about feelings. Realistically, any group will need time to take care of relationships, just as they need time to make decisions and solve problems of a more impersonal nature.

Analysis Inhibitors

Not all situations are appropriate for group work. Not all people should be involved in group discussion or group training. There are three sets of forces, generally identified by most group dynamicists, which can seriously inhibit the use of group process or, on the contrary, foster good group work if accounted for properly. This discussion of inhibitors will take into account some of the practical applications of what has come to be called "contingency theory" about groups. Simply stated, the contingency approach says that if there is a proper interaction of three forces, then group work can be most effective. Weakness of group definition in any of the three forces can seriously inhibit the activities of any group. Leadership has a function to perform in groups, and one of the first (say the contingency proponents) is to determine the balance of inhibiting factors and adjust leadership style and level to accomodate to the existing forces.

The three forces to be considered in making a decision whether or not to use group methods or opt for more authoritarian or

other means of conducting the organization's work) are simply: (a) forces in the leader, (b) forces in the group members, and (c) forces in the situation or environment.

Forces in the Leader

In many settings this is the facilitator, or the appointed or elected leader. There are many ways to determine the leadership tendencies and abilities of people, and Chapter Five deals with leadership. For group facilitation, some characteristics which may inhibit or foster group work include the leader's value system and his/her tendencies or inclinations about lending.[1]

What we are suggesting is that the attitude of the leader has an inhibiting effect if that person is not convinced that groups can accomplish the ends which may be assigned to them. A facilitator's attitude about group interaction will be quickly sensed by the group members and any leader should be cautious about using a group facilitiation system if s/he is impatient with long discussions or uninterested in what others may think.

This relates also to the leader's confidence in the group members. Unless the leader believes the members can bring good quality information and data to the group and can subsequently be trusted to make good decisions, there is little chance for

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[1] In the workshop on facilitating, participants were given a test to determine their attitudes and values about leadership. Using the Blake and Mouton model (treated more completely in the chapter on leadership, Chapter Five), it is possible to assess a person's attitudes for many distinct situations such as classroom, discussion groups, etc. The "S-C Teaching Inventory" measures the subject's interest in "Content" versus interest in "Student" as a personal orientation. Results are plotted on a grid.

a group to succeed. The leader, inhibited by lack of confidence in the members, will simply by-pass, over-ride, or railroad items and not be a facilitator as much as a dictator.

Finally, a leader must be able to accept criticism, either direct or implied. A thin-skinned leader is not likely to put up with a lot of group interaction if the situation becomes uncertain or ambiguous. Ego is therefore, as applied to the leader, an important inhibitor to effective facilitation. A leader who sees the group as a threat to him/her will not be effective in facilitating much interaction because the situation becomes insecure and unstable and the leader has to tolerate a high level of ambiguity and even resistance.

The first inhibiting force is a result of the combined forces in the leader, and these must be checked honestly and accurately if the group is to succeed.

Forces in the Group Members

There are many behavioral tendencies in members which may inhibit good group work. These include personality traits of independence and resistance to authority. As these tendencies underlie the eventual group behaviors, they show up in the expression of expectations of what a group can do. They are also reflected in attitudes about leaders -- and of course the individual person who is facilitating the group at that moment. Open and sharing personalities will likely add more to a group than will the inhibiting factors of their opposites. Personal needs for expression, recognition and involvement must be considered. All these psychological inhibitors which can be inferred from group member statements

or actions will make it difficult to facilitate a successful group.

In addition there are inhibitors of lack of interest and lack of information about the subject being considered. It is hard to motivate people to interact in a group setting if they do not know about nor care about the items being discussed. Levels of knowledge and levels of commitment (involvement or interest) then become other forces in the group members.

Finally, the force that can be very important is how much the members know and understand about the ways groups work. Earlier in the chapter, we cited the lack of information about task and process as a cause for "uninformed expectations." Group members holding naive or uninformed notions about how people interact in groups will have difficulty getting much done. On the other hand, having a number of group members who understand the actual workings of group dynamics can be a real help to facilitating group achievement.

Forces in the Situation

To repeat an item expressed earlier, time is one part of situation. Unless the group has time to interact, there is really no point in trying to overcome this inhibiting force with a "shortened meeting." Another force is the kind of place the group is meeting. Much has been written and discussed about the shape of tables, the seating arrangements in rooms, the room climate, the lighting, and potential distractions to group work, such as noise, interruptions, and other discomforts as smells and drafts.

If the group has a history of successful or unsuccessful meetings, these prior events will have an effect on its potential.

If it is a new group, the attempts to make the situation easy for members and comfortable to move into will have a health effect. New groups suffer from inhibitory forces of uncertainity as to where members sit, what is expected, the appropriateness of the meeting place, the kinds of people these other members and leaders are, etc.

The kind of problem to be solved relates to the kind of organization and group you have assembled. Clarity of purpose, significance of the work, precision of statement about procedures, etc., all add to the effectiveness, just as hesitancy and confusion will inhibit group actions.[2]

Related to most of these items is the question of group size. Inhibiting group work can result from groups of either too small or too large in size. A discussion of group size is included in the section on Supports to Group Effectiveness (below).

Summary

Taking into account the forces in the leader, in the members, and in the setting (or situation) can affect your choice to use or not to use a facilitating style. Groups will not all be the same. Groups will not always act alike, even if the membership is the same or the leader is the same. Any change in any of these forces is like changing one side of a triangle; the other two

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[2] In the book, Dynamics of Discussion (Jones Stanley, Dean Barnlund, and Franklyn Haiman), the authors list the types of discussion groups on a continuum ranging in their formality of structure and function and their purposes to achieve. From least formal, their types are: Casual, Cathartic, Learning, Policy-Making, and Action Groups. Identifying the type of group will have some effect on minimizing the inhibiting forces in the setting.

sides will have to make some adjustment also. You can depend on the statement that no two meetings of any group will be absolutely identical (or no two triangles of group experience will be identical and often not even congruent), and you can measure the forces in advance and make appropriate adjustments to cope with potential inhibitions.

Supports to Group Effectiveness

Training groups and learning groups seem to respond better to activities in which they may participate rather than simply getting told. Obviously there is no clear point at which to use lecturing rather than using group involvement such as discussion. As teachers and trainers and facilitators, however, we must be aware of the potential of group exercises and activities designed to help participants learn about group process, learn about themselves in relation to group dynamics, and learn some skills in promoting and conducting discussion.

There are many sources of materials on experiential activities. Structured experiences published by University Associates or in our textbook Dynamics of Human Communication can be helpful. Two activities which we have used with the training groups in this program are (1) introducing each other, and (2) one-way, two-way order giving, both of which are designed to give facilitation experience which when coupled with the E*D*I*T* discussion system described later.[3]

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[3] Both of these exercises are from Dynamics of Human Communication (Gail E. Myers and Michele T. Myers) and the related instructor manual. Many other appropriate exercises can be found in that same source or in the handbooks and annuals of the University Associates, La Jolla, California whose address is 7596 Eads Avenue, La Jolla, California, 92037.

In the "introduction" exercise, group members pair off and after a brief period of interviewing each other, take turns in making a brief introduction to the rest of the group of the person interviewed. More than an ice-breaker, this exercise taps two of the most common communication activities in our lives: finding out things about each other and having people meet other people. Many personal insights can be gained as well as learning about how people talk about each other in public. In the "order giving" exercise, the point is to compare the one-way and two-way styles of communication in terms of accuracy, time, and feelings of confidence and involvement in the order-giver and the order-takers.

Facilitating Discussion

A persistent fault in training programs has been the tendency to involve groups in games and exercises and then simply assume that some practical and future application of the theoretical principles will occur. It is imperative that as much time be spent in "processing" the activity as is spent in doing it. In other words, the facilitator cannot assume that just because all members of a group took part in some exercise (such as introducing each other) that all members learned either the implications of the activity or learned how to make future use of the information. One of the most effective means of processing group activities is described in the following.

When we refer to discussion, we are not recommending the unorganized, free-for-all, anything goes, kind of rap session. We recommend a highly structured learning experience. It does

not occur without careful design and planning. A facilitator may have any number of devices to engage a group in discussion, and whatever techniques may be familiar to a group leader, the use of E*D*I*T* may be an aid to systematic processing of communication activities or group discussion exercises.

The chance of having a good discussion is better if the system has a structure which permits participation on all levels (content, skill, and affect) and which maintains a purposeful order leading to a significant possibility of learning. The structure of E*D*I*T* lends itself to these requisites. The inclinations of the facilitator and the amount of practice in this system will determine how the exercise will be used.

E*D*I*T* is based on several premises about learning and the learning situation:

-- Learning is more likely to take place if recognition is given to the three levels of learning as they are interwoven and interdependent (cognitive, skills, and feeling).
-- Learning is more likely to take place if careful review of cognitive materials is provided.
-- Learning is more likely to take place if practice in the skills is provided.
-- Learning is more likely to take place if what is happening is related to some theoretical or generalizable ideas about the specific things going on. What can you infer from what is happening which might be a good hypothesis or theory?
-- Learning is most likely to be meaningful or relevant to participants who can make some relations in real life to the activities and the theories of the group situations. How are we going

to apply anything we are learning? So what if we learn this stuff?

Introduction to the E*D*I*T* System. The acronym stands for the steps a facilitator goes through in leading a structured discussion toward having to apply some of the things learned at the three levels of their experiences. The asterisks remind us that it is only through involvement by the participants that we can develop the stages or steps.

EXPERIENCE can be any activity shared by the group with sufficient impact and significance so they will be willing to share information and feelings about it.

DESCRIBE what happened (a) to you and others, as you observed them, (b) to things (moveable or unmoveable); (c) to actions or interactions as behaviors. Descriptions must be limited to what is observable.

INFER from the descriptions of the experience what general principles or theories or hypotheses might be developed about interactions, behaviors, tendencies.

TRANSFER those principles to a useable level in your own life -- how you might use the theory in another situation; how that principle applies to how you run your life, or how the generalization about behaviors applies to what you do.

In our discussion of the use of E*D*I*T* we have not been very specific about how much time it may involve. Be prepared to occupy almost as much time in processing an experience as you would take in conducting the experience itself. Unless you can spend a reasonable length of time, it may be best not to embark on

what might turn into a hurried, frantic, condensed, or foreshortened processing of the experiences. One of the traditional problems in our performance courses is not having enough time for evaluating and criticizing performances. Using E*D*I*T* requires a commitment to take time. Our recommendation would be to start with a small task or experience and spend only a short time on it. That would help you pace the processing sessions. As you get more experienced in E*D*I*T*, the process may be done more succinctly, with more economy of discussion, and more deeply, sometimes by skipping some of the stages as you ask for applications (TRANSFER).

Specifically, the processing of experiences takes time. Unless you can spend time on that activity during any session, do not expect to have significant results from any kind of discussion system and certainly not from this model.

THE FIRST STEP - AN EXPERIENCE (E*). Whether you use the cited exercises or some other exercises to trigger involvement by the members, an exercise or an experience of some kind occurs first. A common experience stimulus, such as laboratory exercises, then becomes the EXPERIENCE on which a discussion can be based.

THE SECOND STEP - DESCRIBE (D*). This part of the sequence has many uses. It can be a chance to review the cognitive data of the EXPERIENCE. It can be a chance to evaluate the skills exhibited in the EXPERIENCE. It can be a good rehearsal for the group members before they are called on to make descriptive evaluations of their own. It can be an excellent practice in "observing" as opposed to "inferring" or "evaluating". The demands of making descriptive statements rather than inferences or value judgments

is a great learning experience just by itself. The period of describing is a useful one, also, in developing practice in and attitudes about the give-and-take of discussion. Again, emphasis should be on describing rather than on valuing. Forcing group members to describe what went on will sharpen attention to important details and help them develop some system for "paying attention."

The essential question to ask members who are in the stage of DESCRIBE is ask them to report what they...

- saw
- heard
- thought
- felt

Although you may have to be active (as facilitator) in the first stage of EXPERIENCE, the second stage of DESCRIBE is the one when you will really have to help to work out the description. If you have difficulty with the members knowing the difference between description and judgment (or observation and inference), you may want to use an exercise like William Haney's Inference Test which is in his revised edition of Communication and Organization Behavior.

Later when you get to the stage for inference, perhaps the distinctions between the descriptions and the inferences will be more clear. At the DESCRIBE stage, however, it is very important to keep the level of comments to description and only to those things which can be either verified from data in the story or are directly stated. Members will tend to leap to the inferences, to give broad generalizations, to make sweeping conclusions, to

sterotype persons in the incidents, and to bring up their own biases and prejudices about activities and people in a highly subjective way. It is important for them to understand that you are not disagreeing with what they are saying, but that the item they offer may be not on the level of description. This is a level which can be verified by reading over the story, by further study of the event or experience, or by looking back at the data which are available to everyone without having to go to our own experiences to make judgments. This may be a difficult concept to have accepted, especially on subjects which may have personal importance to the members themselves. It is not acceptable to develop slogan-type statements or judgments of any kind at the DESCRIPTION stage. You are working on what happened in the activity or the event or the exercise.

You are also working on what happened to the group. If the item was covered by the group, you want to develop this kind of discussion as a dialogue, attempting to generate as much description as possible from the group. It is an exercise in recalling or remembering. In this way, you can review the member reaction to the exercise as well as the content which you have already reviewed with them in the discussion. It is helpful to write some if not all of these descriptions on the blackboard during the stages of learning about E*D*I*T* so the visual reinforcement can accompany the oral discussions.

It is very important for you to explain why you reject inferences, judgments, and hypotheses at this stage, holding most of the useful ones to the next stage. It is also important for

you to support and encourage wide participation in the discussions. Another useful technique to develop understanding of the limits of description is to ask the group to respond with you to the suggestions as to what is description and what is not. Involving the group in that kind of critical judgment is an excellent learning experience, and later a review experience, in evaluating the kinds of statements we make. ("Do you think that is a description? Why not? How could you make a statement of description about the same sort of thing without it becoming an inference or a conclusion? Could you alter that comment to make it a description? What is it you are describing? Can anyone help answer that?") Descriptions concern what happened to any person, to others, to things, to actions or behaviors.

THE THIRD STEP - INFER (I*). Now, it is fair to make sweeping statements, to suggest inferences, and to develop statements about tendencies or principles or theories. After trying carefully under the DESCRIPTION stage to stick to telling what happened, this stage encourages generalizations.

The essential question to ask participants who are in the stage of INFER is to ask them "What have you learned from the experience?" Statements should come from the EXPERIENCE rather than come from the outside. Try to hold the inferences to those things which grow out of the descriptions of the particular experience rather than the total life experience of any member. Things that are likely to occur as a result of the things going on in the experience may sometimes qualify to be listed under the INFER stage.

Again it is suggested you make a list on a chalkboard of at least some of the ideas presented during this part of the discussion. It is also recommended that you involve the members themselves in determining if the statements suggested by others are appropriate for this classification of INFER. Let them develop their critical sense as they argue for or against inclusion of certain kinds of theories or principles or generalizations.

Caution: Try to keep the discussion confined to the EXPERIENCE presented and not let it get too far from that event. There is a tendency for most of us to talk about personal biases or beliefs to the exclusion of the topics at hand.

Caution: Do not settle too easily for slogans or old-wives-tails, even if "everyone knows that..." is acceptable to the group as a truth.

Caution: Do not argue with the members over the content (or the morality or the validity). Check only if these generalizations are appropriately derived from the (a) EXPERIENCE, and (b) the DESCRIPTIONS developed from that experience.

Keeping the concepts in this stage as simple as possible will make more sense when you relate them back to the previous stage and try to bring them along to the following one.

THE FOURTH STEP - TRANSFER (T*). This answers the "So what?" question. It is the transfer of learning from one setting into another--be it the real world the member lives in or another group. Other ways of describing this stage include:

-- How would you put this stuff to work for you?

-- How would you use the theories you saw developing in this discussion?

-- If you believe what is said about this specific or particular instance, how can you generalize it into operating in other parts of your life?

-- Is there any way in which you can make your behaviors more appropriate by applying the principles discussed?

One of the most exciting parts of the learning process is to see the things applied in one situation which may have been learned in another. You can TRANSFER the things you know from one occasion to another, responding to different events with data or skills from a learned experience.

Members can speculate in this system about the ways in which they may adapt the learning into their own lives. Some will be quite ready to imagine applications of the learning to future activities. This is a TRANSFER discussion. Some will be able to predict on the basis of the theories how some "others" will react but will not predict their own behavior. That is likely to be more of the stage of INFER than it is of TRANSFER, since it involves generalizations or predictions about others rather than an estimate of how this learning may be useful to the "me" involved.

The TRANSFER stage assumes that future acts can be changed from the present or past ones. That future assumes there has been something wrong in our communication or in our interactions. Only if we admit to the possibility of change, can we engage in the discussion of the applications of this learning to our lives. While it is not necessary to demand "true confession" from the group; you should be aware that they may be inhibited in their

reactions because talking about future behaviors may include painfully admitting to a need to change.

Facilitating Mechanics

In the setting for group discussion, there are some variables which we can control. Basically we should realize that groups function better if their physical comfort is at a reasonable level: temperature in the room, absence of noise or other distractions, seating arrangements which accommodate the persons themselves and keep them in some kind of communication contact with one another. Having an agenda printed to follow is sometimes helpful if the group tends to wander off the subject. On the other hand, too strict an agenda will stifle creative approaches to solving problems and often will be used by facilitators in place of open discussion.

Two other mechanics for facilitating interaction involve the size of groups and the systems for breaking larger groups into small ones for better discussion.

Size of Groups. There is no magical size for a group. Some researchers have proposed a number of seven as very effective. Others as confidently say that groups of five or groups of nine can be very good. Notice these are odd numbers, and the reason is that it avoids an even split on a pairing off or voting situation. How large is too large? How small is too small? Those questions can only be answered in terms of the task to accomplish, but here is a simple guideline to help you assess the potential for group effectiveness. A group should have a rich variety of resources available in it, and that means generally more than just three

or four people. The variety of resources should also be tapped within a reasonable space of time and within the tolerance of people's interest span. For that reason, a large group (even if it has an abundance of experts in it) will not have an even distribution of speaking time and thus not be able to get all the available data. Therefore, a group much larger than ten will take a lot of time to get around to everybody, and will also have a danger of being dominated by one or two very voluble persons, while the quiet ones either hide or get overwhelmed by the verbosity of the oververbalizers.

Breaking Up Into Small Groups. One way to have effective interactions when a group is very large is to sub-group and later get all groups to share experiences. Groups of fifteen or more will have better interactions on most discussion items if they can be subdivided. Facilitating groups can depend on your ability to break them up for better interaction and then have the small groups report to each other.

One method is to have a "Goldfish Bowl" where half the group performs its discussion function while the other half sits around the outside and observes. Changing roles half way through a discussion can give all members a chance to discuss an issue. To get a representative group inside as well as outside, a recommended system is to have all members count off by "twos." Then all the "ones" are inside the "Goldfish Bowl" for the start and all the "twos" are outside.

Counting off to get sub-groups is a very effective device. It is simple to do, and people have had some experience with it

in their lives. They can understand numbering as a legitimate way of organizing. Although it may sound childish to you before you start it, remember it will go very fast, people will acquiesce to it easily as they have to make no choices of their own, and the greatest advantage to you, the facilitator, is that it will randomize the group. By that, we mean that the group members who come to the meeting together and sit together (the buddy system of group meetings) will be forced to work in a different group, and it makes a better mix of talents than asking all the people in the front or back or some small section of the group to get together. Example: you want to have four groups of about five members each from your group of twenty. Then you simply say to the group: "We are going to form groups by counting off by fours; let's begin here with you as number one, then two, then three, then four -- now, you're one again, two, three, four; and one, two, three, four...," and you point to each person as you say the number. If there is any tendency for the group to arrange itself by cliques, by sex, by car pools, by friends or whatever, then the counting off will break up those little groups and probably give you a better discussion in the small groups thus formed.

Of course, there are other ways of getting small groups from the big one. You can ask people to find x-number of others, as in the example above you could say "We need to have groups of five people, so each of you find four others to work with and let me know when you have organized yourselves..."

There is an advantage to this voluntary sub-grouping if there are to be either sensitive or very intricate problems to solve.

People may know with whom they want to work and therefore will have a chance to select. Enjoying an ease of association with people they already know can sometimes be helpful, although it may encourage people to limit their contacts and their understanding of the discussions.

If you know the members and want to organize their resources to your advantage, you may simply want to assign people to groups. In a group you do not know, or in the early meetings of a group, this is not a useful system. Also, if you have not made good judgments of which personalities can work together, the blame for any failures or conflicts may be given you by an unsuccessful or angry group.

Members can draw cards with numbers or group names on them as another method of getting small groups out of a big one. It may be more personal than counting off, and it still takes the responsibility off the facilitator for "playing God" with arranging people to interact with one another. Chance, rather than the design of the facilitator, can be blamed for any inability to function.

As facilitator, you assume much responsibility for the outcomes of the group's interactions, and we recommend you minimize your involvement when you can. One such place is the sub-grouping of large groups. For their reports to the larger group, you should also avoid selecting the "speaker" or the "reporter", but leave that to the joint wisdom of the small group.

Summary. Large groups do not usually engage easily in discussion, nor are they as effective as smaller ones. Very large groups

(25 or more) surely must be sub-divided if you expect to conduct discussion and not simply "tell 'em." There are many ways which the facilitator can use to make small groups, and they should maximize the interaction of the group and maintain the facilitator's separate role. On the subject of numbers, if the groups are smaller than five, they may lack sufficient resources to carry on a good discussion as there will simply not be enough different points of view, information, or articulate speakers for the representative sides of a problem. Too large a group will tend to be dominated by a few more outspoken ones, and the quieter members can hide very easily if the group has ten or more people in it. Also a large group does not have time to get around to all members (or the patience to sit still while many others have their "say"). Some members will be unhappy either because they were not heard from, or were dissatisfied with the length of time in their "turns."

Facilitating Interaction Sensitivity

Sensitivity to nonverbal communication can be the most useful facilitating tool you can have. We believe that somewhere between 5% and 15% of the information we get from others is obtained through the verbal system -- words mainly. The rest of what we know about each other and events is obtained through nonverbal systems. Particularly the nonverbal cues affect how we hear the verbal communication; in other words, we may want to call nonverbal a sort of a meta-communication, or a communication <u>about</u> communication. It tends to establish relationships rather than give us direct information. Nonverbal helps us understand how we are to accept words from others, relate to the context, and support the verbal system.

Nonverbal consists of many different kinds of "messages." Our facial expressions, including very importantly the eyes, make up one part of our nonverbal. We have "rules" about looking at each other -- how long; where to look; and such specific expectations as "if you talk, you must look" and the converse "if you don't talk, don't look" at each other.

Gestures contribute much to our communication, as do our body postures and stances. Distances we stand from others or how seating is arranged for a group all have an effect on our communication. How simply or ornately we dress, or the kinds of ornaments we wear all tell others something about us and how we expect to be treated.

Paralanguage is a term we use for rate of speech, voice inflections, tonal qualities, and other signals we give others with our voices. These are very important to pay attention to as we work with others in a group.

Of special value to our personal relationships -- more than to the exchange of data or information -- the nonverbal system is very powerful, is very well known to everyone, and is almost never discussed. When the verbal reports we get do not agree with the nonverbal, we tend to believe the nonverbal.

Because we can read the nonverbal cues so well, we sometimes forget that we are using them to judge the behaviors of others. It is important to recognize where we get our information in our group contacts; and when it is nonverbal information, we must rely on it and be able to talk with others about it.

Facilitating group discussion will depend many times on how

well you are tuned in to the feelings and needs of the group. Most of these are expressed nonverbally rather than verbally, and you can be more effective if you will (a) be tuned to these messages, (b) be ready to ask group members openly about their needs or opinions, (c) have confidence that you are tapping a very significant source of group information, and (d) do not play "shrink" with group members by trying to infer <u>why</u> they are reacting as they are, but simply recognize the actions without figuring out their hidden motives.

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Chapter Five

LEADERSHIP SKILLS

Jessica B. Leslie

Introduction

All of the workshops in the Leadership Training series are directed toward enhancing leadership skills. Group facilitation, workshop design, consultation skills, clinical supervision and improved competence in professional development are important in developing one's leadership ability, especially for the leader in education. The purpose of the Leadership Skills workshop is to add to these skills, not duplicate them, by providing new information and the opportunity to synthesize it with the other session topics. The major areas included in this session are leadership style, situational leadership, leadership behaviors, time management, and motivation of others.

Leadership Style

Before receiving any information on leadership, the participants are asked to complete the Blake and Mouton leadership style inventory. Scores on the categories of items are totaled, placing each test-taker in one of five style categories. The categories are based upon two dimensions which are measured by the survey: concern for tasks and concern for people. A high task leader concentrates on achieving the organization's goals; whereas, a leader scoring high on the people dimension concentrates on satisfaction of the organization's members and group climate. Combinations of these characteristics constitute the five style categories listed here.

1. Impoverished Leader - This style actually indicates a lack of leadership. There is little concern for task or people. Most activities are merely performed as a matter of routine. This type of leader places people in jobs and leaves them alone. Self-interest and self-defense determine his or her actions, and the leader has minimum influence upon others.

2. Relationship - Oriented Leader - The leader who has a low concern for task, but a high concern for people, believes that the needs of the organization are contrary to the needs of its people. Production is incidental to the working atmosphere. The organization is run very loosely, and formal requirements and regulations are often ridiculed. Most meetings have as their purpose the promotion of social togetherness, and few goals and tasks are accomplished. The leader is primarily concerned with winning friends and influencing people.

3. Task-Oriented Leader - This leader is the opposite of the Relationship-Oriented leader. With a high concern for task and a low concern for people, the leader places top priority on achievement. Interaction occurs strictly along the lines of authority. This style is based upon the assumption that people are generally lazy, incompetent and must be coerced to work. Staff motivation is attempted by quotas and deadlines. Communication is formal and travels one way, from the top of the hierachy downward. The leader makes the decisions; employees merely comply. To insure compliance, close supervision and tight control are prevalent. People must "produce or perish."

4. Balanced Leader - The balanced leader is neither high nor

low on the two dimensions, rather s/he falls in the middle range. Compromise is the basis for action. This type of leader assumes that people will work hard and comply with reasonable directives. There is a heavy reliance upon conformity to tradition and rules, and communication is two-way, but formal and very general. There is a balance between the importance of tasks and the consideration of people, but not an integration of the two. This style is usually sufficient for getting the job done, but it seldom promotes innovation and change.

5. Integrated Leader - This type of leader has a high concern for people and for tasks. The first priority is to create conditions in which satisfied workers exhibit high task achievement. High morale and positive attitudes are fostered through concerted team effort and involvement. Communication is two-way and open in nature, and personnel are actively involved in the decision-making process. The integrated leader attempts to create an environment in which organizational goals are consistent with individual goals. The key elements are teamwork, participation, cooperation on common goals and group decision making.

Some research has indicated that the integrated leadership style is ideal; however, other researchers argue that no one style is perfectly suitable for all situations. A highly structured, autocratic situation as in the military may run more smoothly with a strong task leader who makes all the decisions. It would not be advantageous to call for a vote to make a decision if an

immediate military attack is impending, nor does a medical doctor poll his or her patients for their opinion of how to treat cases. On the other hand, a school principal may want to involve his professional staff in decisions affecting the school and its students, producing in them a feeling of ownership, dedication and higher morale. It is up to the individual to assess his or her personal situation and leadership style and to make adjustments so that the two are compatible and effective.

Leadership Behaviors

A positive attitude is one of the most important elements in being a successful leader. You will not find a powerful, successful leader who is pessimistic and only sees the negative side of a situation. On the contrary, the successful leader believes that any situation is capable of improvement and that there is always hope even in the direst circumstances. S/he frequently looks to the future, not the past, and sets higher goals, continually striving to achieve them. Leading other people with consistency and enthusiasm encourages them to display the same characteristics. The effective leader sees the best traits in others, utilizes their talents, and encourages their growth.

Understanding human behavior is another important characteristic of the successful leader. S/he is sensitive to people's needs and feelings and understands how to deal with them. A good leader knows how to encourage the introvert, how to utilize the aggressive and how to bring all types of people into harmonious relationships.

Communication skills are extremely important in dealing with human behavior. A leader must be an active listener, not

interrupting until a person has finished what s/he wanted to say. There is much to learn about communication skills, some of which are included in Chapter Three (Consultation), Chapter Four (Group Facilitation), and Chapter Six (Clinical Supervision). A good leader can be charismatic, calm and persuasive, or to-the-point and firm when necessary, but s/he must always be genuine.

Constant planning is crucial for a successful leader. To accomplish any task efficiently and effectively, a leader needs a clear, organized plan. S/he is goal-oriented, constantly looking beyond a given point in time. The first step in organizing for action is to set long term goals for oneself. The leader needs to decide, if only tentatively, what s/he wishes to do twenty, or perhaps thirty or forty, years from now. These should be written in the form of goals. For example, one's goal may be to become a school district superintendent.

The second step is to determine what procedures are necessary for attaining the long term goals. The person who wishes to become a superintendent will need to obtain the proper certification and receive experience in the field of educational administration. These should be listed as subgoals under the long term goal of becoming a school superintendent. Each of the subgoals should be further divided into more specific objectives (obtaining financial assistance to attend a university, etc.) until the present time period or starting point is reached. The result is an organized hierarchy of life time goals with their corresponding subgoals necessary for attainment. Each goal should have a tentative time limit and a clearly defined procedure for attainment. The leader now has a plan toward which s/he can work. Wandering aimlessly

in several directions with no particular purpose in mind is not necessary. Self-direction and organized action can set the stage for becoming a successful leader.

Organizational goals should also be established in the same manner. If, for example, you are in charge of professional development for your school or district, you should ask yourself what outcomes you and the other professionals for whom you are responsible wish to achieve. Together, longer term goals need to be identified followed by the establishment of the subgoals. A hierarchy of goals will provide a visual representation of the direction that a school has decided to take. A team effort in working toward the attainment of those goals will make a great difference in the degree of success.

A good leader perseveres in the goals and plans which are established. Everyone suffers hardships and setbacks, but it is the successful leader who keeps trying. The motivated person who knows in which direction s/he is moving is the one who does not deviate from the path because of intermittent problems. Perseverance for the future, not anguish over past or present adversities, will create successful achievement.

Time Management

Just as an organized plan is essential for developing a course of action, the management of one's time is crucial in the implementation of the plan. Ivan Fitzwater (1977, p. 37), a nationally recognized authority on time management, states,

> It is human nature to rationalize our shortcomings. We can find reasons and

> plausible justification for just about anything we do or do not do. There is one exception: We can't say that someone else has been given the edge on time. Who would believe us if we said, "Sure George sold more widget's than I did; he has twenty-eight hours every day and I only have twenty four." The truth is we all get the same number of seconds, minutes, and hours every day.

How we utilize our time is what makes the difference. In his book on time management, Ivan Fitzwater describes several techniques for accomplishing more in less time.

Utilizing the goal setting procedure previously described is one of the most effective time-savers there is. It places a person in an established direction with a definite purpose. Time is not wasted in back-tracking and starting over on a task. The goal and method for reaching it is clear and provides a scheme for proceeding, especially if broken down on a daily basis. The person who starts each day with a daily schedule or list of tasks in order of priority is more likely to accomplish them in less time than a person who has no definitive plan and who merely takes things as they come. The former person is proactive and is in control of time; whereas, the latter person is reactive and is controlled by time.

Group activities or tasks can also save time. For example, if you need to visit several classrooms, schedule them in one block of time so that you can visit one after another. Set up a particular time in which you return all telephone calls so that you do not find yourself returning a phone call every thirty minutes and interrupting progress on a particular task. Establish a set

period of time for office hours so that you have fewer interruptions and more control over your schedule. People will learn when you are available and will wait to see you at the allotted time. If you have several things to do in a particular part of the building, do them at the same time while you are already there. You need not make several trips to a particular location if one will suffice.

Grouping of tasks will help you complete a task in less time because you will experience fewer interruptions and will not find yourself continually "starting over." Fifteen minutes in the morning spent on scheduling activities for the rest of the day can save valuable time for other activities. It is true that unforeseen events occur which require immediate attention, but this does not mean that you cannot have a daily schedule. In fact, an organized schedule will allow you more time to deal with these emergencies, no matter how frequent they may be.

Paperwork is often viewed as a burden, but it is, nonetheless, a necessity of most jobs. The amount of time spent handling paperwork can be minimized. Again, set aside a particular time for reviewing mail and other papers. Learn to skim materials, selecting those items which are relevant and those which are not. Take immediate action on each paper after you read it; do not set it aside for future consideration. If you do, you will merely waste time reading it a second time. If it is worthy of action, do it immediately whether it entails completing a form, writing a report or delegating it to the appropriate person. If no action is required, throw the paper in the trash can. There is no benefit in handling papers more than once. Complete paperwork during

the time allotted for it and move on to your next task.

As you become accustomed to a more organized schedule, you will discover that your work tempo has changed. Rather than vascillating between "full speed" and "stop," your work pace will be steadier and more productive. You can accomplish a great deal without feeling "frazzled" at the end of the day.

Much time can be saved by avoiding duplication. It is quite often the case in many organizations that several people are working apart on the same task. If the organization has developed a hierachy of goals, this is less likely to occur. It is still important, however, to make sure that everyone understands who is responsible for what activities. Tasks should be clearly assigned to individuals or groups so that duplication of efforts is avoided.

Meetings should be held only when there is a sufficient reason. Having a meeting just because it is regularly scheduled at that time is a poor use of everyone's time. If a decision is to be made during the meeting, the background material necessary to make the decision should be distributed and read before coming to the meeting. There should always be an agenda for the meeting, and it should be adhered to closely. Every meeting should start and finish on time. It is not fair to punish those people who appear on time by making them wait for the late-comers. All to often, people say, "I know we can be late. These meetings never start on time." After a meeting consistently begins on schedule, people will instead say, "We can't be late or we'll miss the beginning of the meeting." Meetings should also finish on time or even early if possible. Well planned meetings which accomplish

their purposes and adhere to staced timelines will result in people who are more willing to attend and participate.

If you have a parent, teacher or coworker who repeatedly tends to usurp your time needlessly, be courteous but hold a stand-up conference. If you do not sit and relax to talk, that person is less likely to stay a long time. As a result, both of you will have wasted less time.

Motivation of Others

Every good leader realizes the importance of motivation. Consider the difference between someone you know who is highly motivated and someone who is not. Motivated employees are enthusiastic, ready to work, and often put in more time and effort than are expected of them. They work to their highest potential. On the other hand, unmotivated employees watch the clock, perform at low levels, resent doing anything not in their job description and are not dedicated to the cause or work at hand. These employees are the ones who can make or break an organization; therefore, it is essential that the leader of that organization know how to motivate people.

One of the most effective means of motivating others is by example. Working with someone who is motivated is often all the encouragement a person needs. Motivation is contagious, and it is up to the leader to be the "carrier".

Abraham Maslow's (1965) hierarchy of needs is a valuable tool for understanding human behavior underlying motivation or lack of motivation. He has listed five levels of needs of which all people seek fulfillment. They are arranged in a hierachical

fashion so that the first level of needs must be met before the second level of needs can be met. The five levels are:

I. Physical Needs (food, clothing, shelter, etc;)
II. Safety Needs (safety, security, etc.)
III. Need for Love (love, affiliation, belongingness, etc.)
IV. Need for Self-esteem (self-respect, esteem from others, etc.)
V. Self-Actualization (Self-fulfillment)

The first level contains the basic needs which include food, clothing, shelter, and rest, or in short, some level of financial security. Once a person's physical needs are met, he or she becomes concerned about safety and security which is closely related to the first level. The third level is the need for love and the feeling of being a part of something or of belonging to a specific group, such as a family. Without this emotional security, a person is not likely to move on to higher levels of fulfillment. The need for self-respect and esteem from others is important to the individual whose lower needs have been met. A good self-concept leads people to self-actualization, the highest level of attainment on the hierarchy. Self-actualized people have a good understanding of themselves. They know who they are, where they want to go and where they fit into this complex world. They are secure, satisfied with their being and have complete peace of mind.

An understanding of the people around you and a knowledge of their stage of need development can help you become a better motivator. If you have teachers, paraprofessionals, or principals

who are still operating on the first two levels, you can guess what will motivate them -- physical rewards which help meet their basic needs. Teachers realize that when they have a student who is starved for love, affection and attention given that child will serve as a better motivator than a piece of candy. Teachers also realize that in a classroom with no heat in the coldest part of the winter, little learning will occur until those students are physically comfortable. Persons that have a strong desire for esteem and prestige will feel honored in being singled out to chair a committee or task force. A self-actualized person will quickly respond to opportunities for further professional and personal growth when no physical reward is offered.

It is imperative to know your coworkers well. You must learn what their needs are, discover what motivates them and carefully match those persons with the tasks needing attention. Consider the following example.

Suppose that your school district has mandated that each principal is responsible for the inservice program in his or her school. To develop a purposeful program, the principal decides to involve the school's staff members in the design of the program. A professional development committee is established to conduct a needs assessment, devise an inservice program, and implement and evaluate it. Hopefully, enough personnel volunteer their services so that a balanced representation of positions is achieved. The act of volunteering is in itself an evidence of motivation. However, the principal may wish to appoint some people to the committee for the purpose of getting them motivated in improving themselves

and their surroundings. The principal, after some cooperative research and brainstorming has occurred, may need to assign tasks to particular members of the group. The person who has a high need for esteem may be the best candidate for the chairperson. Because of the need for prestige, s/he will provide that extra effort for getting the job done effectively. A person at the self-actualized level who is motivated by self-growth should be willing to research content areas or new methods of implementing inservice activities. A person who needs to feel a sense of belonging may work better on a group task rather than on an individual one.

The same principle applies to the other side of the situation. A teacher still concerned with level one or two may have to be paid a stipend to attent optional workshops, because self-growth is not a priority. A vice-principal may appear unmotivated because s/he is only given the mundane and routine tasks to perform when this person has higher needs to be fulfilled. A person seeking self-improvement may lose interest in a job if not given higher level responsibilities for achieving self-growth. Ascertaining employees' levels of need development and attempting to help fill those needs through organizational goals and responsibilities can result in a highly motivated professional staff performing at optimum levels. Recognition and rewards have different meanings for different persons. It is the successful leader who can identify the proper motivators for particular individuals so that the entire group benefits from everyone's talents and abilities.

Summary

This chapter describes the leadership skills presented in this workshop from the Leadership Training series. Although all of the workshops presented in the training series describe leadership skills (consultation, group facilitation, clinical supervision, etc.), this chapter focuses on the more specific management skills associated with leadership behavior.

It is the author's contention that no matter what style of leader one may be, everyone can raise his or her level of success. Although not all effective leadership characteristics are described in this one chapter, there are many of the essential ones which the individual is able to control and which can be improved upon for becoming a better leader. A successful leader is one who is able to adjust leadership style or behavior to fit the situation, understand the people with whom he or she works, establish long and short-term goals, make a systematic plan and schedule, utilize time effectively and motivate others. An effective leader discovers and utilizes the talents and abilities of others for their own benefit and satisfaction and for the good of the organization. A successful leader is only as effective as the people around him or her.

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Chapter Six

CLINICAL SUPERVISION

Bruce M. Frazee

Introduction

This chapter presents a description of the clinical supervision training session. Clinical supervision is an important aspect within the intensive Leadership Training component of the Professional Development Model. Each instructional support teacher in every school has the ability and training to perform clinical supervision.

Purpose of Training Session

The major goal of the clinical supervision training session is to prepare each participant with the knowledge and ability to apply clinical supervision as a technique to improve classroom instruction. Following are the specific objectives for the session:

1. To communicate a technique of clinical supervision which would be used for improving classroom instruction and not as a means of evaluating personnel within the district.
2. To provide practice in using the three phases of the clinical supervision model.
3. To encourage independent reading of clinical supervision.
4. To observe the application of the clinical supervision process.
5. To evaluate and discuss the use of supervision.

Overview of Training Session

The professional development session is organized around three blocks of time. The first block consists of presenting background information about clinical supervision. A definition of clinical

supervision is given along with a rationale for using this particular type of supervision. After discussing what clinical supervision is and how it can be applied, the need to use good interpersonal communication skills is discussed in relation to increasing the success of the model. The steps of the clinical supervision model are presented, followed by a discussion about the application and concerns of the model.

The second block deals with a detailed discussion on how to apply the steps of clinical supervision. The participants are prepared to look for the steps of the model while viewing a video-taped, role-playing session between a supervisor and a teacher. The video tape serves as a means for the participants to observe the clinical supervision process being used in a classroom. Next, the participants are paired for role-playing. Each person plays the role of a teacher and a supervisor in order to practice the step-by-step process involved in clinical supervision.

For the final block of time, each person is asked to seek one volunteer teacher and classroom in his/her school and clinically supervise the teacher. After this assignment is completed, the support teachers return to the last session of the clinical supervision workshop. The concerns and experiences that participants encountered while practicing the supervision model with the volunteer teacher are discussed. Some interesting problems and concerns are voiced during this final open discussion session.

Definition

The label clinical supervision is used in this program and is based on the model developed by Morris Cogan, Robert Goldhammer,

and others at the Harvard School of Education. For the purpose of this session, clinical supervision is defined as a process by which peer supervision provides structured feedback for use in self-evaluation in order to improve an identified instructional problem. In order to work with this definition, three stages from the clinical supervision model are presented.

Rationale and Background Information

Many times, teachers desire input about a particular need or concern over a situation that exists in the classroom. The clinical supervision model provides a format for the supervisor and teacher to cooperatively acquire valuable data for classroom improvement. With other supervision models, classroom visits usually consist of someone who appears in your classroom, writes a few notes, leaves and has little or no feedback for improvement. The teacher's needs and concerns are ignored while the supervisor goes through this unsystematic style of supervision. The supervisor has little idea of what the teacher is trying to do and how this lesson would relate to previous or past lessons. Most of these types of supervision visits are conducted to meet some district requirement of teacher evaluation--not teacher improvement. Clinical supervision, on the other hand, is a technique which addresses the specific need of teacher improvement rather that sporadic, general evaluation.

Another major advantage of using the clinical supervision approach is that a change of attitude and climate within a school is likely to take place. With this model, an opportunity for teachers to express, analyze and share their concerns with a peer supervisor creates a responsibility and commitment towards improvement. By

involving the teacher in evaluation and change in the classroom, the likelihood of higher morale and job satisfaction is increased. All people have a basic need for positive input and personal attention in order to grow in a profession. Without this personal stimulation and encouragement, teachers can become forgotten in their classroom until the annual district evaluation. Clinical supervision offers a constructive technique to assist teachers in improving and growing in their profession.

Stages of Clinical Supervision

Stage one consists of a pre-observation conference. Decisions are made as to how, what, when, and where the observation will take place.

Stage two is the actual classroom observation in which specific events are recorded.

Stage three is a followup conference to self-evaluate the data obtained from the classroom observation.

After the final conference, the stages can be initiated again, particularly if the teacher desires more input. However, it is not necessary to repeat them if the teacher is satisfied with his/her progress.

Application of Clinical Supervision Stages

Stage One

Stage one in the clinical supervision model involves a conference between the teacher and the supervisor. The objectives of the conference are to establish the following:

1. Build a rapport and trust.

2. Define the parameters of clinical supervision.

3. Identify an observable concern of the teacher.

4. Develop an observation instrument which provides data for the supervisee's observable concern.

5. Establish a time and day for the observation.

Obviously, before any supervisor can help another teacher, a sense of trust and rapport must be established. In this professional development model, building a positive relationship is facilitated by the fact that the support teacher or supervisor is a peer teacher in that school. A positive attitude toward promoting teacher improvement must be demonstrated. It is necessary to understand and define the role of the teacher and supervisor in the supervision process. A nonthreatening environment must be established.

It is very important at this stage to assure the teacher that the information discussed is treated confidentially. The information obtained is to be used for classroom growth and in no way should the information acquired be used for district evaluation for termination or promotion. Because of this sensitive issue, peer supervisors usually function better in this capacity than administrators, who usually have a conflict of interest due to their role in district evaluation of teacher competence. All of the data obtained by the supervisor are to be used by the teacher for self-evaluation and self-improvement. To break this trust undermines the purpose of clinical supervision.

Clinical supervision is not infallable. The technique centers around cooperation between the supervisor and the teacher in order to alleviate or lessen an observable classroom concern. Teachers

must truly desire growth and must be able to identify their concerns. In addition, the teacher must analyze the data that the supervisor collects. The supervisor is the catalyst and the reference/resource person. The supervisor does not have all the answers but helps the teacher find answers. The supervisor's support and knowledge helps to lead the teacher through self-evaluation.

The supervisor needs to ascertain the amount and kind of attempts that have been made at resolving the teacher's stated concern. In other words, what attempts has the teacher already made at resolving the concern? What response did the teacher obtain when attempting to deal with the concern?

The supervisor should not expect all teachers to have a classroom concern. The clinical supervision model works best if teachers know what it is, including its advantages and disadvantages, and then request that the supervisor assist them with the clinical supervision classroom visit. By identifying a concern and understanding each other's roles, the clinical supervision approach to improving classroom instruction is enhanced.

Once an observable concern has been identified and a sense of understanding and trust have been established, it is time in the conference to devise an observation form for the supervisor to use during the classroom visitation. The form should be simple and provide some base-line data which the teacher can use for self-evaluation. Any rating form which is agreed upon and provides objective data on the observable concern will work. The supervisor uses his/her expertise and observes the rate or occurrences of the concern in the classroom. Only data that relate to the concern are to be recorded.

The advantage of using a form is that it provides written, first-hand knowledge from a supervisor which can then be used by the teacher to self-evaluate the situation.

Stage Two

Stage two of the clinical supervision model is the actual classroom observation to collect the data using the established evaluation form. The teacher needs to present the lesson in the typical manner as it has been used in the past. It is important not to deviate or cause the concern to occur, but to conduct the lesson in the usual manner. The supervisor should be as unobtrusive as possible. The task is to observe the occurrence of the concern and to record the events in order for the teacher to interpret and evaluate the classroom events surrounding the concern. After the observation, the supervisor should encourage the teacher to establish a day, time, and place to discuss the data if it cannot be done immediately after the lesson. In some instances, the supervisor might need some time to organize the data before presenting it to the teacher.

Stage Three

Stage three, the final stage, is the followup conference. The supervisor needs to present a summary of the concern and data collected during the classroom observation. The supervisor must use caution in not telling the teacher what the solution to the concern is or what the data represent. The data are presented to the teacher for self-evaluation. The analyzing of the data and possible solution is the responsibility of the teacher. The supervisor can guide and make a few indirect suggestions, but the concern

and the solution should belong to the classroom teacher. At the end of the conference, the supervisor should summarize the evaluation and offer any other special assistance if necessary. Encouragement toward using the supervisor as a data collector and support agent is the more important role of the clinical supervisor.

Communication Skills

The communication skills a supervisor possesses are extremely valuable and necessary in working with the clinical supervision model. Much of the work the supervisor does with the teacher is based on communication skills. This is where the chapters on Consultation and Group Facilitation play an important role in clinical supervision. Because these skills are presented in detail in these two chapters, communication is discussed briefly, capitalizing on those skills which specifically pertain to the supervision process.

The first skill is active, attentive listening. If the clinical supervision model is going to work properly, the supervisor must spend most of the time listening to the teacher. Good eye contact and genuine concern need to be demonstrated by the active listener. Always let the teacher complete what s/he has to say without interrupting or changing the subject.

During the pre/post conference, the art of questioning is crucial in establishing and organizing a plan for identifying and correcting a classroom concern. When you must say something as a supervisor, it is best to start with clarifying questions. These types of questions are useful in demonstrating that you are trying to understand the person's situation. It can also help the teacher to better understand the situation. Clarifying questions are usually better if they

are open-ended rather than yes or no questions. Example: "Do your students respect you?" (closed). "Can you tell me how your students feel about you?" (open). Clarifying questions aid the supervisor and teacher in mutually understanding and communicating a concern.

A third communication skill is focusing. This skill helps the supervisor to pinpoint a topic that is beneficial to explore. It is also important in getting the teacher to narrow or isolate a concern for in-depth discussion. It is particularly helpful to use this technique after having heard the larger, overall situation surrounding the teacher's concern. After focusing in on the situation, the supervisor can lead the teacher in analyzing and recommending possible solutions to the identified concern.

Another skill is paraphrasing. In paraphrasing, the supervisor restates important facts or events that the teacher has communicated. This is helpful because it is a communication check to see if the supervisor/teacher agree on what has been said.

Another skill for checking communication is perception checking. Here the supervisor asks the teacher to restate what has been said in order to insure that accurate communication has taken place.

The final skill is summarizing. This is a natural way to end the discussion. It provides a review and a final check so both the supervisor and teacher have a common understanding of plans and agreements. It is also beneficial in a summary for the supervisor to reflect upon the feelings of the teacher. A positive statement is a good way to conclude the summary along with encouragement that a comfortable solution to the concern can be achieved.

After the presentation of the communication skills, pairs of

participants are divided into alternating roles of supervisor/teacher. The person role-playing the teacher presents a concern to the supervisor and requests clinical supervision assistance. They practice the first and third supervision stages, utilizing the communication skills in the pre-observation and post-observation conferences. The second stage, the actual classroom visitation is practiced during the take-home assignment discussed in the next session. After the first role-playing situation, the participants reverse roles so that the teacher becomes the supervisor, and the supervisor plays the role of the teacher.

Observing and Practicing Clinical Supervision

After identifying and defining the process of clinical supervision and the related attitudes and skills a supervisor must exhibit, a video-tape recording is shown to the participants. The VTR helps the participant observe the application of the model and how a supervisor would use his or her skills in the various steps in the clinical supervision model. While viewing the tape, the participants are asked to observe the following:

1. The steps involved in clinical supervision.
2. The manner in which the supervisor established rapport and trust.
3. The use of the communication skills discussed earlier.
4. The techniques used in devising a data-gathering instrument.
5. The manner in which the supervisor leads the teacher through the process of self-evaluation.

The text of the video consists of a supervisor and a teacher using clinical supervision for the teacher's concern of a student

speaking out during class discussion. Each step of clinical supervision is represented and observed by the participants. After the video-tape, the participants have the opportunity to role-play a concern that they have. Each person alternately plays the positions of supervisor and teacher. This enables everyone to practice the steps of clinical supervision while applying the necessary skills. After the role-playing session, the participants answer and discuss the following questions:

1. Was supervisor terminology clear and understood?
2. Was the supervisor a good listener?
3. Was the teacher's concern observable?
4. Was a measuring (evaluation) system devised?
5. Were judgement statements made?
6. Did the supervisor attempt to give directions or advice or did s/he allow for self-evaluation?
7. Was the supervisor/teacher defensive?
8. Was a comfortable environment and reasonable solution to the concern attained?

After this session is completed, a take-home assignment is given in which each participant works with a teacher in his/her school in order to apply the clinical supervision model.

Reaction To Clinical Supervision

The last task deals with a discussion about the experiences that the participants encounter during their assignments. The following questions are used to structure the discussion.

1. How (un)successful was your practical experience with clinical supervision?

2. How was the teacher's attitude toward a clinical approach to supervision?

3. What are the advantages and disadvantages of clinical supervision?

4. Do you think clinical supervision has a place in your position at Edgewood ISD?

5. Will you use the clinical model? How? Can you delegate clinical supervision to other staff members? How?

6. What obstacles keep you from implementing a clinical approach to supervision?

7. What addition or deletion would you make to the clinical supervision model?

This discussion session aids the participants in reflecting upon their experiences and in sharing them with the other participants. Discussing successes, as well as obstacles and strategies for overcoming the obstacles, allows the support teachers to receive feedback and mutual assistance in developing their own supervision styles.

District Use of Clinical Supervision

At this time, the instructional support teachers are using the clinical supervision model when teachers request a classroom visit. By using peer teachers for clinical supervision, the threat of district administrator evaluation over a classroom concern is alleviated. This permits instructional support teachers to concentrate on working with teachers to improve the instruction and curriculum in each of the schools. Clinical supervision works and provides teachers with an excellent opportunity to improve and grow professionally.

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Chapter Seven

WORKSHOP DESIGN

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Introduction

Workshops constitute but one facet of inservice education, but they are an important one. Just as a professional development program needs a careful design, so does a workshop. There is an important difference between a workshop "plan" and a workshop "design." A workshop plan is usually a set of activities intended for use with a particular audience. The plan can range from being very general to being more specific. Regardless of the amount of detail provided, it is, nonetheless, quite different from a design. The term design has a more comprehensive meaning. It signifies the overall schema of the workshop--its goals and objectives, schedule, sequencing, pacing, description of procedures, materials needed, and evaluation techniques. One key to producing optimum learning from a workshop is the use of an overall design, as opposed to a generalized set of lesson plans.

A six-step approach to workshop design has been developed and used in the Leadership Training. It is a modification of the procedure used by Ben Harris (1980). The six steps are:

1. statement of the problem,
2. statement of the goals and objectives,
3. selection of the activities,
4. design of the session,
5. evaluation plan, and
6. followup plans.

Each of these six steps is described in the following sections.

Statement of the Problem

When a request is made of a consultant to do a workshop, there is generally a particular topic requested. To obtain more detail, the consultant should ask, "What is it you would like for the participants to be able to do (to know) after the workshop?" Knowing the specific problem enables the consultant to design a workshop that is well-targeted to the participants' needs.

Another important consideration in understanding the problem is defining the time frame for the workshop. The amount of time available is crucial to the design of the session. Particular goals and activities may not be feasible if the allotted time is short. The distribution of time is also a factor. Sessions to extend over a larger period with "break times inbetween can allow for applications to the participants' personal or professional situations to occur. With an intermittent time frame, followup activities are easier to implement and longer term retention of learning is more likely to occur.

Stating the problem is also dependent upon the audience to be served. Why do the participants need these particular skills? Where will they be applying them, to whom and for what purposes? The size of the audience also affects the type of activities to be selected. Certain activities are more feasible for particular sizes of groups. The consultant may need to regroup a large audience so that several small group activities can occur simultaneously.

Once the consultant has identified the audience, the time frame and specific topic or skills to be addressed, the problem

can be clearly stated. At this point, the consultant is ready to establish goals and objectives specifically targeted to the participants' needs.

Statement of the Goals and Objectives

There are numerous formats which can be used in writing workshop objectives. The one used in the Leadership Training Workshop Design session is a simple one divided into two parts: major goals and performance objectives.

In formulating the major goals, the consultant must refer to the statement of the problem and ask several questions. Who are the participants? What type of knowledge and skills do they need? How will these new skills and knowledge be applied and to whom? Once these questions are clearly answered, the consultant can write the major goals to be achieved by the participants. The goals must be completely relevant to participants' needs.

Each major goal can be subsequently divided into performance objectives. These objectives describe the performance on the part of the participant that will serve as an indication that the major goal has been achieved. Depending upon the purpose of the workshop, the performance objectives can be, but need not be, stated in behavioral terms. Consider the examples below.

1.0 The participant will develop a positive attitude toward designing workshops.	1.1 The participant will give session evaluation feedback on the evaluation instrument with 85% of the responses marked a five, six, or seven. (Instructional rating scale is one to seven.)
	1.2 The participant will participate in all session activities 100% of the time.

2.0 The participant will acquire the skill of evaluating a workshop.

2.1 The participant will categorize items on an evaluation instrument as to whether they are input, process or product items.

2.2 The participant will complete a branching diagram and interpret the multiple relationships which resulted from a fictitious workshop.

In major goal 1.0, achievement is to be evaluated by a rating instrument; whereas, goal 2.0 is to be judged by consultant observation of the activity and/or the complete categories and diagrams. The first goal establishes performance levels; the second goal does not. Both methods can be equally effective depending upon the sensitivity and follow-through employed by the consultant.

In addition to specifically targeting objectives to the participants' needs, a major consideration in establishing the goals and objectives is to provide for a variety of learning levels. At this point, the legendary taxonomy by Benjamin Bloom (1956) can be extremely helpful. Each one of the workshop objectives should fall into one of the categories: knowledge, comprehension, interpretation, application, analysis, synthesis and evaluation. In some sessions, especially those with elapsed time between them so that participants can practice the skills before returning to the session, an added category, behavior adjustment, is also possible. There should be a reasonably balanced representation of all the categories. Knowledge is important, but application makes it useful to others. Affective objectives produce as important results as do cognitive objectives. All forms and levels must be present for true learning to occur.

Selection of the Activities

Once the goals and objectives have been finalized, it is necessary to select activities to allow the workshop participants to accomplish the goals. Two factors must be considered: appropriateness of match to the objective and potential learning impact upon the participant.

Activities must be carefully matched to the objectives to achieve optimum learning. Ben Harris and his associates (1980) have developed an inservice design grid to illustrate the matching technique. The grid lists examples of workshop activities (lecture, demonstration, brainstorming, roleplaying, etc.) and matches them with the type of desired outcome (knowledge, comprehension, values, etc.). For example, if the consultant wishes to impart basic information about a topic, a lecture may be the most efficient and appropriate method. Role-playing would less likely achieve the same result as well as a lecture. However, if the consultant desires to change attitudes about a topic, buzz sessions or role-playing may be far more effective than a lecture. Choosing particular activities is largely a matter of common sense and experience, but the design grid is very beneficial, especially for the novice consultant.

The potential learning impact of a workshop activity can actually be measured by a simple process called an experience impact analysis. Some activities are more effective than others in stimulating participants to learn. This does not mean that certain activities scoring low on an experience impact analysis should never be used. Again, appropriateness of match to the objective is just as crucial a factor.

In order to measure the potential learning impact of a particular activity, an impact score, ranging from 7 to 21 is assigned. Each activity is rated on seven characteristics; each characteristic carries a value of one, (low), two (medium), or three (high). The seven characteristics are (Harris, 1980):

1. Senses involved - extent to which the various senses (hearing, visualizing, etc.) are required for an activity.
2. Multiple interactions - extent to which communication is one way, two way, etc.
3. Controlled experience - extent to which the activity has structure.
4. Focus - extent to which the activity has a particular purpose or focus.
5. Activeness - extent to which the activity calls for passiveness (low) or activeness (high) by the participant.
6. Originality - extent to which the activity is original in content and form.
7. Reality - extent to which the activity relates to realities or real situations, rather that abstractions.

A score of one indicates the activity is low in these areas, and a score of three indicates it is high on the characteristics. An example of three workshop activities scored in this manner is provided below:

Activity	Senses Involved	Multiple Inter-actions	Con-trol	Focus	Active-ness	Origi-nality	Real-ity	Total Impact Score
Lecture	1	1	2	2	1	1	1	9
Roleplaying, Structured	2	2	3	3	3	2	3	18
Guided Practice	3	3	3	3	2	2	4	19

There is not a correct score which can be given to every activity, rather these scores are merely suggested estimates. How a consultant may rate his or her own workshop activities will be influenced by the workshop setting and the particular content and format of the specific activity. Nonetheless, the consultant is able to use the potential impact of an activity in conjunction with matching techniques in effectively selecting activities to fit the session objectives.

It should be noted that other factors also affect the selection of relevant activities, such as room size and arrangements, size of the group, time frame, and equipment available. If the room is small and crowded with furniture, roleplaying becomes difficult. If there is a large audience, lecture may be more feasible than guided practice. If time is short, small group activities such as brainstorming and buzz sessions become more difficult. If a film projector and/or overhead are not available, visual displays are less of an option. Hopefully, the situation will allow for the consultant to design the workshop first and then arrange for the workshop needs.

Design of the Session

Once the workshop problem is stated with the participants in mind, the goals and objectives written, and the appropriate activities selected, it is time to arrange these in a meaningful design. Design aspects to be considered are time requirements, sequencing and pacing of activities, materials and equipment needed, and space requirements.

The first step involves estimating the amount of time required

for each selected activity. The total amount of time should equal the time frame allotted to the workshop. The ideal situation is one in which the consultant sets the time limit according to what is needed, rather that having a limited imposed. The total impact score should be listed next to each activity.

While reviewing the list of activities with their time allotments and impact scores, the consultant needs to develop an effective sequence of events. Several considerations are pertinent. It is always helpful to begin a workshop with an introductory warm-up exercise to aid participants in familiarizing themselves with the others. There are numerous types of events called "ice-breakers" which help initiate the workshop. They can often build a spirit of cooperation which maximizes the potential of success. It is also beneficial to follow with an introduction to the workshop, including its goals and objectives and general agenda which should be in the possession of each participant. This initial clarification assists the participants in understanding why they are there and when they can expect to "break," go to lunch or complete the workshop. Without this certainty, they are likely to worry about it throughout the entire workshop, thus losing their ability to concentrate on the material presented. A wise procedure is to stay closely with the time limits and agenda as designed. Closing the workshop with a summary of what was learned and achieved during the session aids the participant in synthesizing the newly acquired knowledge and skills.

In sequencing and pacing the activities, the time required, impact level and the type of event are important. Activities with high impact scores should be alternated with medium or lower

impact events. If the workshop only contains high impact events, the participants will tire before the session is completed. A continual string of high impact activities may indicate that the workshop is entertaining but lacking in the presentation of cognitive information. Low or medium impact methods often provide a time for participants to receive important knowledge, rest, analyze, synthesize, and evaluate. Higher level activities provide opportunities for participants to actively practice the new skills and use the information presented. A balance of impact levels is essential for optimum learning. Furthermore, the longer activities should be spaced between the shorter ones. Impact level can also be partially balanced by assigning more time to the higher impact events and less time to the lower or more passive activities. Different types of events should also be spread among the design. Shorter lectures (none should be long) can be followed by guided practice or roleplaying. Films can be preceded and followed by more active involvement such as in brainstorming or problem solving.

A logical progression which is used in the Leadership Training series is providing information or describing a skill, followed by an activity to immediately apply the new knowledge or practice the new skills, and then processing the activity so that the participants understand the information presented and its application. Processing or summarizing every event is extremely important for allowing the participants or organize their new knowledge and store it for future use. The process activity should be facilitated by the consultant, but actually performed by the participants so that clarification of new knowledge is in the form that the

participants, not the consultant, devise for themselves. A more detailed explanation of activity processing is covered in Chapter Four, Group Facilitation.

A session design form provides a helpful tool for sequencing the selected activities and summarizing the design of the workshop. Figure 7.1 provides a sample of a portion of the form used in the Leadership Training Workshop Design session. Once the sequence and pacing of the workshop is tentatively established, it can be recorded on the form for easier viewing. The consultant merely lists the activities in the determined order along with the time required, the corresponding objective number, impact score, materials and equipment needed and the space requirements. The form helps the consultant view the pacing and sequencing of events, allowing adjustments to be made when necessary. A more detailed description of each activity can be written on a separate page if the consultant so desires.

Making a graph of a tentative sequencing of events can also assist the consultant in visualizing the session design. Located on the vertical axis is the range of impact scores, from seven to twenty-one. The horizontal axis contains the time sequence in minutes. As can be seen in Figure 7.2, the activities are placed on the graph in their proper sequence and numbered. For example, activity number one, a warm-up exercise, has a duration of thirty minutes and an impact score of seventeen. As the remaining events are plotted, a visual picture of the workshop with its peaks and valleys is provided.

Figure 7.2 contains a graph of a fictitious workshop design

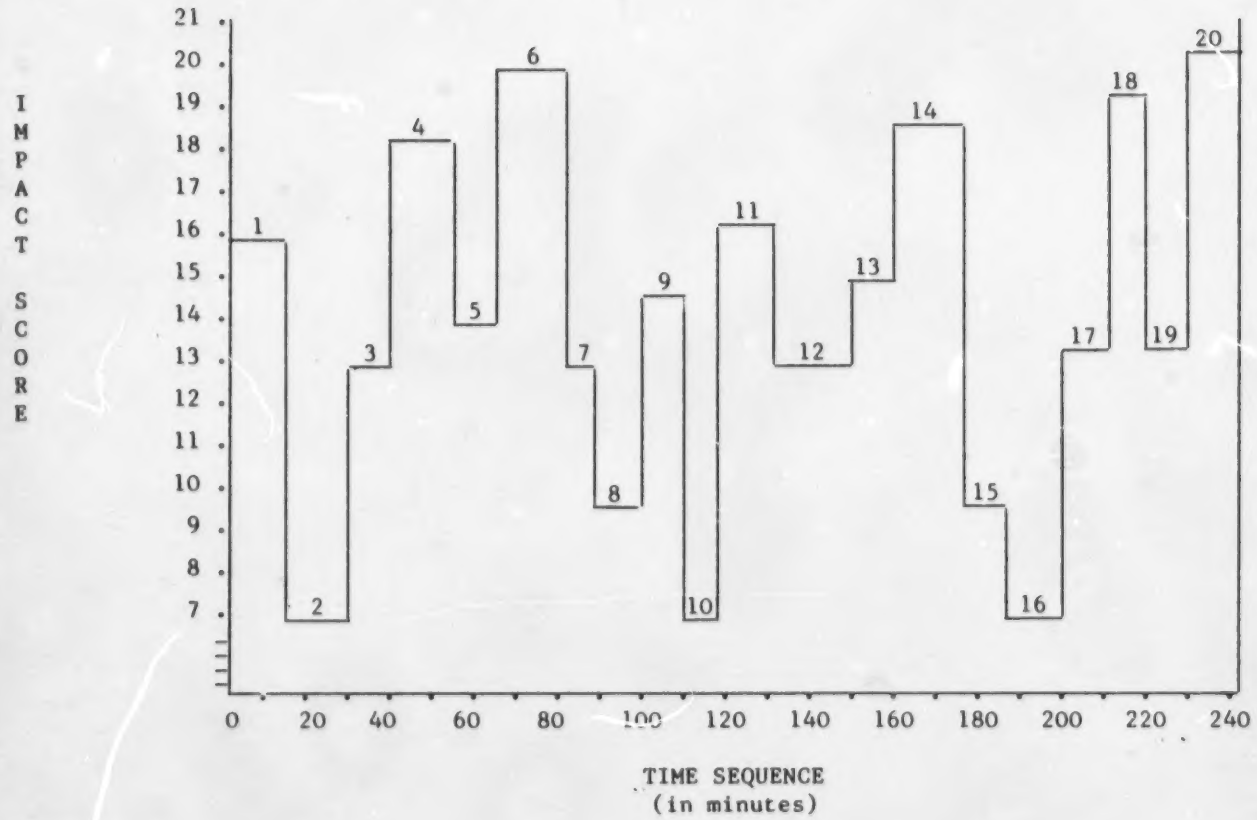
FIGURE 7.1

SESSION DESIGN FORM
"WORKSHOP DESIGN"

TIME (IN MIN.)	EVENT NUMBER	OBJECTIVES	ACTIVITY	EXPERIENCE IMPACT LEVEL	MATERIALS/ EQUIPMENT	SPACE REQUIREMENTS
30	1	1.2 1.3	Lemon Game - "Ice-Breaker"	17	35 Lemons	Large Group Area
5	2	1.2	Large Group Discussion Goals	12	35 Copies of Goals and Agenda	Large Group Area
5	3	1.2 2.1	Individual Reading Assignment	14	35 Vignettes	Large Group Area
15	4	2.2 3.1	Lecture-"Inservice Education" & "Design V. Plan"	7		Large Group Area
15	5	1.2, 2.1	Large Group Discussion	12		Large Group Area
15	6	4.1 5.1	Lecture-"Designing Workshops: Needs and Goals"	8	35 Copies of Goals and Objectives	Large Group Area
15	7	1.3	Break	13	Coffee & Donuts for 35	Large Group Area
15	8	1.2, 1.3 5.2	Buzz Groups-Categorizing Objectives	15	Overhead Projector; Transparency of Taxonomy	Small Groupings of Tables
10	9	1.2 5.2	Large Group Discussion	12	Overhead Projector; Transparency of Categorized Objectives	Large Group Area
20	10	7.1	Lecture-"Selecting Relevent Activities"	9	35 Copies of Harris' Inservice Design Grid	Large Group Area
30	11	1.2 6.1	Guided Practice-Schedule of Events	19	70 Blank Schedule-of-Event Forms; Overhead Projector; Transparency of Session Design Form	Large Group Area

FIGURE 7.2

ACTIVITY IMPACT SEQUENCE GRAPH



session. It is realistically paced with intermittent levels of activity included. It begins with a high-medium impact event, is evenly spaced with high, medium and low events, and it finishes with a high impact activity. The session design form together with the activity sequence graph place the workshop in visual perspective. The session form also serves as a valuable tool for aiding the consultant in conducting the workshop and staying on task.

Evaluation Plan

There are a variety of techniques for evaluating a workshop. The typical method is to distribute an evaluation form at the end of a session, score it and perhaps leave it at that. The results are generally reviewed, but use of them seldom occurs. The purpose of evaluation is to determine what succeeded, what failed and why it did so. It is the "why" which is often overlooked, and yet the "why" gives us the clues for making improvements. If, as consultants, we do not followup the evaluation with self-improvement, we hinder our opportunities to grow and become better workshop presenters.

The model used by our Teacher Corps project involves three concepts in the evaluation plan: input, process, and product (Harris, 1980.) The inputs reflect characteristics and behaviors that the participants bring to the workshop. These may be occupation, years experience, prior knowledge of the content to be covered, a particular grade level, or any other variable which may be of significance to the success of the workshop. The processes are the methods with which the consultant attempts to achieve the objectives.

These may be buzz group sessions, lectures, demonstrations, simulations, active or passive participation, or guided practice. The products are the outcomes expected. Were the objectives achieved? Was the workshop perceived to be relevant, stimulating and useful?

All three concepts should be included on an evaluation instrument. For example, an input item may ask about the participatant's school, grade level taught or years teaching experience. When the responses to the input items are analyzed, the consultant will have a description of the workshop participants. There may be a group of teachers and a group of administrators in one session, or the group may consist of all paraprofessionals with five to seven years of experience. In many cases, the presenter may find that the group which was initially described to him or her was not the one actually in attendance. This may make a great deal of difference in the evaluation results.

Process items ask for more detail about the perception of the individual workshop activities. A sample of a process item is listed below:

Indicate the extent of your involvement in each of these activities by circling the appropriate number, using the following scale: 5=highly involved; 3=some involvement; 1=no involvement.

Listening to lecture	1	2	3	4	5
Brainstorming	1	2	3	4	5
Buzz Groups	1	2	3	4	5
Consultant Demonstration	1	2	3	4	5
Roleplaying	1	2	3	4	5

Another process item may inquire about the activities which stimulated the participant to learn. The same format could be used as on the sample provided.

Product items ask about the outcomes or overall effect of the workshop. A sample item would be:

Circle the number which reflects your overall interest in the session.

1	2	3	4	5
Dull		Somewhat Interesting		Very Interesting

Additional product items may inquire about the session's relevance, value for new learning, or practical usefulness, using a similar format.

There should also be an item on needed followup assistance. An open-ended item asking participants to make comments is always helpful.

Using the input-process-product model allows the consultant to systematically analyze the evaluation results or the "why" as well as the "what". Knowing whether or not the workshop was successful is interesting, but understanding why it succeeded or failed allows for specific adjustments. The consultant may discover that the group of teachers found the session to be relevant, but the principals did not; therefore, the presenter needs to better accommodate the principals. The lecture may have been stimulating, but the roleplaying exercise was a failure. The teachers who were highly involved in the guided practice may have perceived the workshop as valuable for new learning; whereas, the uninvolved teachers may have found few new knowledge gains. In this case, the problem lies not with the process or guided practice, but with the ability

to involve and relate to all participants in this particular activity.

The process for analyzing the results is not as difficult as it may appear to be. A simple branching diagram developed by Ben Harris (1980) acts as worksheet for analyzing instrument scores. Figure 7.3 is an illustration of an analysis plan diagram derived from the evaluation results of a fictitious workshop. The results have been scored so as to illustrate the concept of the branching design.

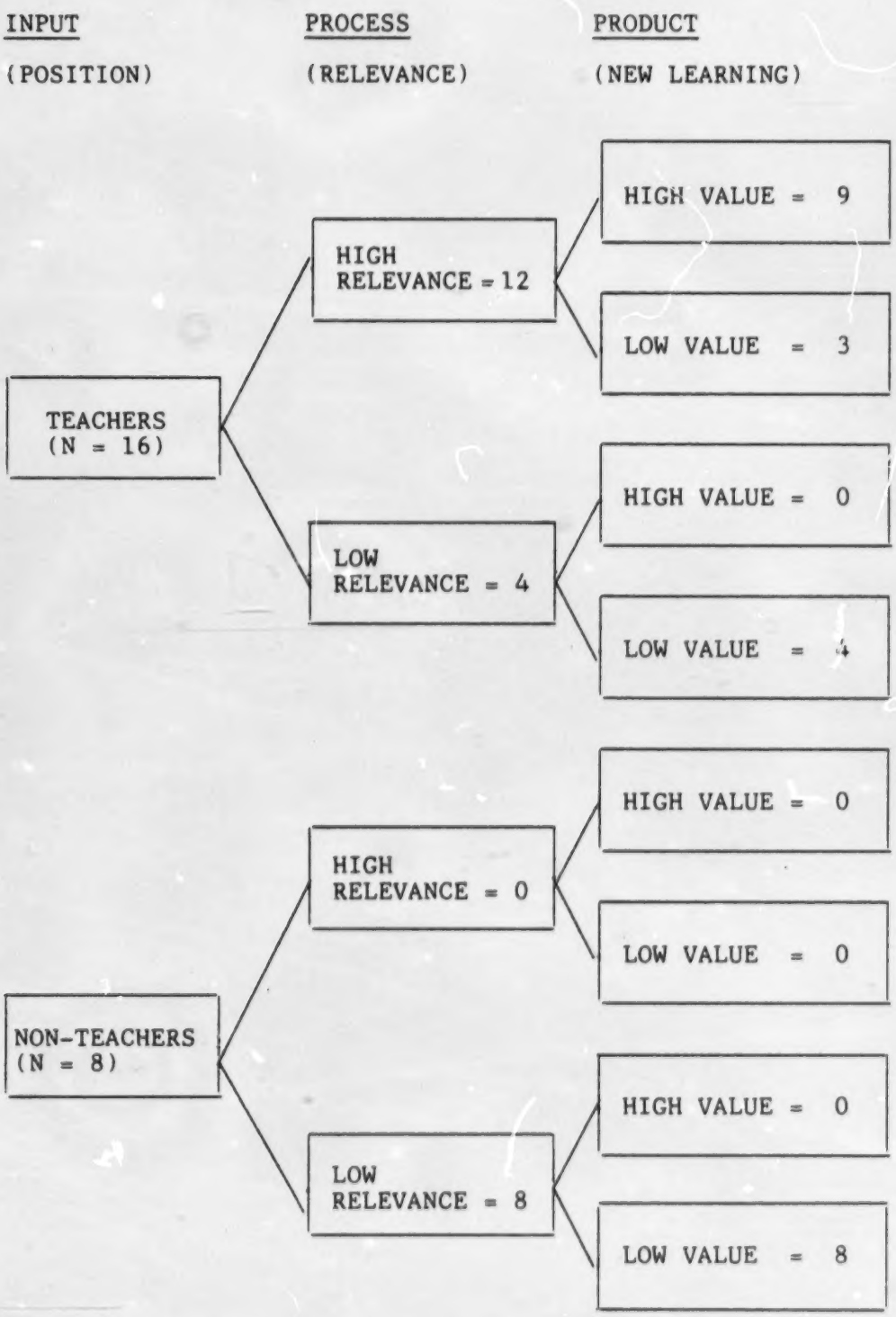
The three variables analyzed in this diagram are position (input), relevance to position (process), and new learning (product). With each set of variables examined, a blank diagram is needed. Product items such as relevance can be used as process items. All three concepts overlap. The major consideration in choosing variables is the question that the consultant wants answered.

In the example illustrated by Figure 7.3, the evaluation instruments are divided into two groups--teachers and non-teachers. The teacher group is further divided into two sub-groups--those which rated the workshop as highly relevant to their position and those who rated it low in relevance. Those teachers who rated it high in relevance are sub-divided into those who perceived the session valuable for new learning and those who did not. The same is done for those teachers who rated it low in relevance. The non-teacher group is treated in the same manner.

Several conclusions can be drawn from studying the completed diagram. There are sixteen teachers and eight nonteachers. Of the sixteen teachers, twelve rated the workshop as highly relevant

FIGURE 7.3

BRANCHING DIAGRAM



(a score of 5 to 7) to their jobs; four rated it as low in relevance (a score of 1 through 4). Those teachers who found the workshop highly relevant also found it valuable for new learning. Those who perceived the workshop as irrelevant to their needs learned little from the session. The nonteachers did not find the workshop relevant; therefore they also learned little from the workshop. Viewing the results in this manner tells the consultant a great deal about the success of the workshop and how to make it more successful in the future.

The possibilities for discovering multiple relationships between variables are numerous. Other sets of variables which could be investigated are:

1. Years experience (input) - Involvement in roleplaying (process) - Value for new learning (product)
2. Name of the participant's school (input) - Relevance of the topic (process) - Practical usefulness of the session (product)

The combinations which can be examined are determined by the questions to which the consultant desires answers. Experience and intuition also play a role.

Followup Plans

Too often, educational personnel receive a workshop and no followup is provided. They are expected to change after one session with no additional assistance. In many cases, it is the followup that serves as the key to anchoring new knowledge and applying it to one's personal situation.

Followup should begin during the initial workshop. An observant

consultant is able to note those participants who need additional aid. Informal comments made are an excellent indication of a person's work situation and what action may be needed to further this person's growth. Unfortunately, the workshop presenter is seldom consulted by the district or employing organization about the need for further attention. Generally, the consultant can only offer suggestions and hope they are heeded.

An item concerning followup possibilities on the workshop evaluation instrument can add to the credence of the consultant's suggestions. If, for example, 85% of the participants request additional help, it is difficult for the organization to ignore the plea. A second item should request information about the mode of followup desired -- workshop, individual consultation, group consultation, demonstrations, etc. Also of interest is the particular knowledge or skill in question. Upon reviewing informal comments and formal evaluation results, the consultant is able to make an intelligent decision on how to proceed.

Another helpful tool in determining followup needs and procedures is the use of a survey. After a reasonable amount of time has elapsed after the workshop, a survey on additional service can be distributed to the workshop participants. After having time to try the new techniques, the participants may have a better understanding of what type of additional help would be beneficial.

Followup assistance occurs in many forms; it need not be another workshop. Depending upon the perceived needs and resources available, it can include classroom observation, clinical supervision, demonstrations, informal buzz sessions, individual and group consultation,

networking, curriculum adjustments, or minicourses. A description of the followup procedures for the entire Leadership Training is described in the introductory chapter. It serves as but one example of the techniques and benefits of a systematic followup program.

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* This manuscript was typed by Olga De Leon.